CHAPTER 1

Satisfactory Academic Progress

This chapter provides an overview of Satisfactory Academic Progress (SAP) and discusses how to:

- Set up SAP.
- Process and maintain SAP.

Understanding SAP

This section includes an overview of SAP calculations and discusses:

- Eight tests for SAP.
- Student selection criteria for SAP evaluation.
- Batch, online, and simulation processes.
- Pass 1 and Pass 2 evaluations.

Overview of SAP Calculations

The SAP online or batch process determines a student's SAP status by comparing calculated values with established setup or student-specific rules. The process calculates up to eight separate tests. The institution chooses whether or not to use each of the following tests and sets the rules for each:

- Academic Standing
- Maximum Attempted Units
- Maximum Attempted Terms
- Minimum Current GPA
- Minimum Cumulative GPA
- Current Earned Units
- Cumulative Earned Units
- Two Year GPA

The process uses the user-defined rules to calculate a status code for each individual test and then calculates an overall status code. The overall status code is determined by the highest severity code for each test used. All calculated statistics and status codes are populated on the Student SAP page, which has a Packaging Status Summary link to the updated Satisfactory Academic Progress field on the Packaging Status Summary page.

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The calculated code or override status code determines the Satisfactory Academic Progress value on the Packaging Status Summary page. This value is used for other Financial Aid processes and is only updated when the SAP process is run. Further change to the SAP status value can be made only on the Student SAP page, which automatically updates the Satisfactory Academic Progress field on other pages.

SAP calculation can be performed two ways:

- Term processing, which is based on a single term.
- Aid Year processing, which is based on multiple terms within an aid year.

When updating the Satisfactory Academic Progress field on the Packaging Status Summary page:

- Term processing looks up the term being processed on FA Term and uses that FA Term aid year to update the Packaging Status Summary page.
- Aid Year processing uses the aid year being processed to update the Packaging Status Summary page.

The calculation and evaluation of the rules of the eight tests uses a student's data from Student Career Term and Student Enrollment, which are both term-based tables. Consequently, you must define which terms are evaluated for the calculation based on each of the two processing types (term and aid year). Here is how the two process types differ:

- For term processing, you define a specific term in which to determine SAP eligibility. This setup step associates all the terms to be used for evaluating the eight tests when calculating for this specific term. For example, SAP eligibility for spring 2008 term is based on data from the fall 2007 and summer 2007 terms.
- For aid year processing, you define a specific aid year in which to determine SAP eligibility. This setup step associates all the terms to be used for evaluating the eight tests when calculating for this specific aid year. For example, SAP eligibility for Aid Year 2008 is based on data from the fall 2006, spring 2007, and summer 2007 terms.

The SAP process selects the group of students to be updated based on selection entered on the run control page or established criteria for a single student when running online. The following table lists the hierarchy used by the process to determine which exception rule or setup rule to apply for each of the eight tests.

Rule	Consequence
Aid Year or Term Exceptions	If an override exists on the Aid Year Exceptions page or Term Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data), the student-specific aid year or term exception rule is evaluated. If the student fails, the exception failure default is assigned and the exception and fail flags are set to Yes. If the student does not fail, then the next type of rule in this hierarchy is reviewed.
Career Exceptions	If an override exists on the Career Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Career Exceptions), the student-specific career exception rule is evaluated. If the student fails, the exception failure default is assigned and the exception and fail flags for that test are set to Yes. If the student does not fail, then the next type of rule in this hierarchy is reviewed.
Academic Plan, Academic Program, Academic Career	The academic plan, academic program, and academic career rule (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria) is applied if the student is active in a matching academic plan, academic program, and academic career. If a match is found, the corresponding status is assigned and the fail flag for the test is set to Yes. Otherwise, the Career Pass Default Status code is assigned.

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Rule	Consequence
Academic Program, Academic Career	The academic program and academic career rule (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria) is applied if the student is active in a matching academic program and academic career. If a match is found, the corresponding status is assigned and the fail flag for the test is set to Yes. Otherwise, the Career Pass Default Status code is assigned.
Academic Career	The academic career rule (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria) is applied if the student is active in a matching academic career. If a match is found, the corresponding status is assigned and the fail flag for the test is set to Yes. Otherwise, the Career Pass Default Status code is assigned.

Eight Tests for SAP

The Satisfactory Academic Progress feature uses eight specific tests to measure whether a student is making progress. Three tests (Academic Standing, Maximum Attempted Units, and Maximum Attempted Terms) are quantitative evaluations and five tests (Minimum Current GPA, Minimum Cumulative GPA, Current Earned Units, Cumulative Earned Units, and Two Year GPA) are qualitative evaluations. You set up rules for each test on the Criteria1 (quantitative) and Criteria2 (qualitative) pages.

During the test evaluation, each student's actual value for the test is calculated. Then the process searches through setup rules for a match to that value:

- If no rule matches are found, the student is considered to have passed the test and the Career Pass Default Status code is assigned as the SAP status for that test.
- If a rule match is found, the student is considered to have failed the test and the corresponding SAP status for that rule is assigned as the status and the fail flag is set to Yes.

  The student should then be warned or disqualified. Therefore, it is strongly recommended that you set up the rules to cover the full range of fail requirements with no overlaps.
- An additional quantitative setup, Statuses and Actions rules, is used to compare a student's newly determined SAP status with a previous status and then assign a different status. Statuses and Actions rules can only be applied to Pass 1 eligible records.

  This can be used for multilevel probation statuses.

The SAP Status field in each of the test rule setup grids indicates which SAP Status code to use if a student meets the rules of the test. Ranges and statuses are set up to find students who are not making progress. The rules that you set up should cover the entire range by career, by career and program, or by career, program, and plan. If you set up a rule with program and plan blank, but ranges populated, the process evaluates all students based on the career defined on the Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup). It is important that the rules do not overlap each other as this can cause runtime errors. You can set up these failing tests for any academic program and academic plan combination.

Academic Standing Test

Student Records calculates the academic standing value each term. The Academic Standing test determines the SAP status code based on the Academic Standing value for either the evaluation term or for the maximum term the student was enrolled within the aid year as defined in the Define Evaluation Aid Year page. The SAP status is determined as follows:

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- If the Academic Standing field is blank or an academic standing action row does not exist for the maximum term, the Undetermined Default Status code is used.
- If no student-specific exception exists for this criteria and the student is set to the Career Pass Default Status code, Student Records must enter an academic standing value for the student, which can then be calculated normally.
- For students affected by an aid year exception or a term exception, the SAP status is set to Exception Fail Default Status.
- If no override exists for academic standing, the process searches for a match by career, program, or plan and the associated SAP status is used if a match is found.

  When no rule match exists, the Career Pass Default Status code is used.

Maximum Attempted Units Test

This test first counts the units attempted at the institution and does not include any transfer units. The total units attempted at the institution are summed from student enrollment, counting units that are within and prior to the term or aid year being processed. The process uses either the units-taken value or, if that value is zero, the Financial Aid progress units to gather this sum of units attempted at the institution.

The student must be enrolled in the maximum term past the fully graded date. Audited units are not counted. Second, the transfer units are added to that sum from Student Career Term based on the transfer unit options selected on the setup. If no transfer unit options are selected, then the Maximum Attempted Units test only includes units attempted at the institution.

Additionally, if course exclusions are set up and the student is enrolled in any of the defined courses, then those units are subtracted from the attempted unit calculation.

You can select any or none of the following options for including transferred units in attempted units:

- The Towards GPA option counts transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.
- The No GPA option counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- The Course Credit option counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits.
- The Test Credit option counts test credit units that have been matriculated for the term prior to or including the term being processed.
- The Other Credit option counts other credit units that have been matriculated for the term prior to or including the term being processed.
- The TC Units Adjust option subtracts transfer credit adjustments from the attempted unit total that have been entered for any term prior to or including the term being processed.

You can use the following Course Exclusion options to subtract Remedial and/or English as a Second Language (ESL) courses from attempted units:

- Subtract all remedial course units set up in Course Exclusions that the student is enrolled in unless the value of the total remedial units that the student is enrolled in exceeds the value in the Max Remedial Units to Exclude field. For example, if the student is enrolled in 8 remedial units, and the Max Remedial Units to Exclude value is 3, the SAP process count 5 of the 8 remedial units in the attempted unit calculation.
- Subtract all ESL course units set up in Course Exclusions that the student is enrolled in unless the value of the total ESL units that the student is enrolled in exceeds the value in the Max ESL Units to Exclude field.

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The setup should cover the entire range of units by career, by career and program, or by career, program, and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

Maximum Attempted Terms Test

The Maximum Attempted Terms test is based on the number of attempted terms by academic career, as indicated by student enrollment. A term is counted if units are taken, enrollment status is *enrolled,*and at least one course in that term is not audited. A term is not counted if the student either completely drops or audits all courses in that term.

If a student has a career-specific exception, that is evaluated first. The setup should cover the entire range of units by career, by career and program, or by career, program and plan. If a rule match is not found, the student is assigned the Career Pass Default Status code.

The setup should cover the entire range of units by career, by career and program, or by career, program, and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

Minimum Current GPA Test

The Minimum Current GPA test tests whether a student's current GPA falls within a certain range in relation to a range of cumulative earned units. In an example test rule, a student who has between 31 and 60 cumulative earned units and current GPA between 0.00 and 2.99 is assigned a disqualified status.

This test evaluates both the student's current GPA and cumulative earned units. The cumulative earned unit value used in the comparison for this test is not derived in the same way as it is for the Cumulative Earned Units Test. Instead, the value is taken directly from the Total Cumulative Units field on the Student Career Term table for the term being evaluated.

The Minimum Current GPA test has two options, an average GPA or a special GPA.

Special GPA is calculated as follows:

- If a student has an aid-year or term-specific exception, that is evaluated first.
- If the Special GPA field is populated in the setup, the process compares that student's individual Special GPA Type value to the setup rules.
- If the Special GPA field is populated in the setup, and the Student Special GPA Type is blank or does not exist for the student, the Undetermined Default Status code is used.
- If the Special GPA field is not populated, an average GPA is calculated for this test and is compared to the setup rules.

  This average is calculated by summing the total GPA for all terms for the student within the aid year and then dividing by the number of valid terms from the student career term data.

The current GPA is determined through evaluations:

- For Pass 1, the sum of all of GPAs of the fully graded terms associated with the Aid Year or Term being evaluated divided by the number of the fully graded terms associated with the Aid Year or Term being evaluated. For example, if you are evaluating eligibility for the fall 2006 term and the associated terms are fall 2005 (GPA = 2.50), spring 2006 (GPA = 3.00), and summer 2006 (GPA = 3.50), then the current GPA to be used in the test would be (2.50 + 3.00 + 3.50) divided by 3 equaling 3.00.
- For Pass 2, the current GPA of the most recent enrolled term that is less than the lowest numbered evaluation term associated with the Aid Year or Term being evaluated. For example, if you are evaluating eligibility for the fall 2006 term and the associated terms are fall 2005, spring 2006, and summer 2006, and

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no term data exists for the student, but the student does have spring 2005 term data, then the GPA for spring 2005 is used in the evaluation. Pass 2 does not look at the fully graded date.

The setup should cover the entire range of units by career, by career and program, or by career, program and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are used to find students who are not making progress.

Minimum Cumulative GPA Test

The Minimum Cumulative GPA test examines whether a student's cumulative GPA falls within a certain range in relation to a range of cumulative earned units. In an example test, a student who has between 31 and 60 cumulative earned units and a cumulative GPA between 0.00 and 2.00 would fail.

The Minimum Cumulative GPA test has two options, the Total Overall GPA and the Special GPA.

- If a student has an aid year- or term-specific exception, that is evaluated first.
- If a student has a career-specific exception, that is evaluated second.
- If the Use Special GPA Code field is populated in the setup, the student's Special GPA is used, if the student has a matching Special GPA Type defined.
- If the Special GPA field is not populated in the setup, the cumulative GPA value from the student career term record is used.

  This is the total overall GPA including transfer units from student career term.
- If the Special GPA field is populated in the setup and the Student Special GPA field is blank or does not exist for a student, the Undetermined Default Status code is used.

The Cumulative GPA is determined through evaluations:

- For Pass 1, the cumulative GPA as of the most recent fully graded term associated with the Aid Year or Term being evaluated.
- For Pass 2, the cumulative GPA of the most recent enrolled term that is less than the lowest numbered evaluation term associated with the Aid Year or Term being evaluated. Pass 2 does not look at the fully graded date.

This test evaluates both the student's cumulative GPA and cumulative earned units. The cumulative earned unit value used in the comparison for this test is not derived in the same way as it is for the Cumulative Earned Units Test. Instead the value is taken directly from the Total Cumulative Units field on the Student Career Term table for the term being evaluated.

The setup should cover the entire range of units by career, by career and program, or by career, program and plan. If a rule match is not found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are used to find students who are not making progress.

Current Earned Units Test

The Current Earned Units test compares the student's attempted units and earned units and assigns an SAP status code. You choose to measure by percentage (percentage of completed units for the current term or aid year) or number of units (number of units to be completed for the current term, by term or aid year).

For example, a student whose attempted units for the current term were between 9 and 12 and earned units were between 0 and 6 might fail.

Unit values are calculated as follows:

- Attempted units are calculated from institutional units only.

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Units are summed from student enrollment from the aid year or term being evaluated. To gather the sum of units attempted at the institution, the process uses the units taken value or if that value is zero, the Financial Aid progress units. The student must be enrolled in the maximum term past the fully graded date. Audited units do not count. Grade Exclusions are not factored into the Attempted Units portion of this test. No transfer units are included.

- Earned units are calculated in one of two ways:

  If grade exclusions are not enabled, units are calculated as the sum of the values from the total passed with GPA and the total passed without GPA on the student career term table. Transfer units are included in the values being summed.

  If grade exclusions are enabled, as with attempted units, the units are derived from student enrollment, but with transfer units included. Then courses that are on the grade exclusions setup are subtracted from the total.

With the attempted units and earned units determined for the aid year or term, the calculated SAP status code is determined in one of two ways:

- Use Percentage

  The student-specific percentage is compared to the calculated percentage (earned/attempted). If the calculated percentage falls within the percentage range and attempted units fall within the attempted units range, the student receives the status associated with the rule. Otherwise the student receives the Career Pass Default Status code.

- Use Completed Units

  The student-specific number is compared to the calculated number (earned/attempted). If the calculated earned units fall within the earned units range and attempted units fall within the attempted units range, the student receives the status associated with the rule. Otherwise the student receives the Career Pass Default Status code.

The setup should cover the entire range of units by career, by career and program, or by career, program, and plan. If no rule match is found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are used to find students who are not making progress.

Cumulative Earned Units Test

The Cumulative Earned Units test compares the student's cumulative attempted units and earned units and assigns an SAP status code. For example, a student whose cumulative attempted units were between 45 and 60 and cumulative earned units were between 0 and 30 would meet the rule.

Attempted units are institutional units summed from student enrollment and include units from all terms within and prior to the aid year or term being evaluated. The process uses either the units-taken value or, if that value is zero, the Financial Aid progress units to gather this sum of units attempted at the institution. Audited units are not counted. Grade Exclusions are not included in attempted units. You then have the option to include different types of transfer units in addition to the institutional attempted units. Transfer Options include:

- The Towards GPA option counts transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.
- The No GPA option counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- The Course Credit option counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits.
- The Test Credit option counts test credit units that have been matriculated for the term prior to or including the term being processed.

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- The Other Credit option counts other credit units that have been matriculated for the term prior to or including the term being processed.
- The TC Units Adjust option subtracts transfer credit adjustments from the attempted unit total that have been entered for any term prior to or including the term being processed.

Earned units are calculated in one of two ways:

- If grade exclusions are not enabled, first institutional units are taken from the cumulative earned unit value from student career term table for the term or highest term for the aid year being evaluated. Then transfer units are included based on the transfer unit options selected.
- If grade exclusions are enabled, units are summed from student enrollment similar to the base cumulative attempted units. Then courses that the student is enrolled in that are on the grade exclusions setup are subtracted from this total. Transfer units are included based on the transfer unit options selected.

You can use the following options for transfer units to be then included in the cumulative earned units calculation:

- The Towards GPA option counts transfer units that have been matriculated for any term prior to or including the term being processed as included in GPA units.
- The No GPA option counts transfer units that have been matriculated for the term prior to or including the term being processed as no GPA units.
- The Course Credit option counts transfer units that have been matriculated for the term prior to or including the term being processed as course credits.
- The Test Credit option counts test credit units that have been matriculated for the term prior to or including the term being processed.
- The Other Credit option counts other credit units that have been matriculated for the term prior to or including the term being processed.
- The TC Units Adjust option subtracts transfer credit adjustments from the attempted unit total that have been entered for any term prior to or including the term being processed.

With attempted units and earned units calculated, the calculated SAP status code is determined in one of two ways:

- Use Percentage

  The student career-specific percentage is compared to the calculated percentage (earned/attempted). If the calculated percentage is equal to or greater than the student career specific rule, the student receives the Career Pass Default Status code. If the student has zero completed units, the Zero Earned Default Status is used. If the calculated percentage is less than the student career-specific rule, the student receives the SAP status code associated with that rule.

- Use Completed Units

  The student career-specific number is compared to the calculated number (earned/attempted). If the calculated earned number is equal to or greater than the student specific rule, the student receives the Career Pass Default Status code. If the student has zero completed units, the Zero Earned Default Status is used. If the calculated earned number is less than the student career-specific rule, the student receives the SAP status associated with that rule.

Ensure that the setup covers the entire range of units and percentages or numbers by career, by career and program, or by career, program, and plan. If a rule match is not found, the student receives the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

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Two Year GPA Test

The Two Year GPA test reviews students who, at the end of their second year, are maintaining at least a C grade point average, that is, a 2.0 or above grade average. This test checks whether a student's current GPA falls within a certain range in relation to a range of attempted terms. In an example test rule, a student who has attempted between 3 and 4 terms and whose current GPA is between 0.00 and 1.99 is assigned a nonpassing status.

Attempted terms are counted by academic career from student enrollment. A term is counted if units are taken, enrollment status is *enrolled*, and at least one course in that term is not audited. A term is not counted if the student either completely drops or audits all courses in that term.

Two options for deriving the cumulative GPA value are the Total Overall GPA and the Special GPA:

- If the Special GPA field is populated in the setup, the Special GPA type is used, which is the cumulative GPA earned at this institution.
- If the Special GPA field is not populated in the setup, the cumulative GPA value from the student career term record is used. This is the Total Overall GPA including transfer units from student career term.
- If the Special GPA field is populated in the setup and the Student Special GPA field is blank or does not exist for a student, the Undetermined Default Status code is used.

The Cumulative GPA is determined through evaluations:

- For Pass 1, the cumulative GPA is as of the most recent fully graded term associated with the Aid Year or Term being evaluated.
- For Pass 2, the cumulative GPA is from the most recent enrolled term that is less than the lowest numbered evaluation term associated with the Aid Year or Term being evaluated. Pass 2 does not look at the fully graded date.

In the setup, you must define the number of terms that equals two years of study at your institution. You can set up rules for any combination of terms and GPA by career, by career and program, or by career, program, and plan. If a rule match is not found, the student is assigned the Career Pass Default Status code. The ranges and statuses that are set here are to find students who are not making progress.

Student Selection Criteria for SAP Evaluation

Student selection criteria are the same for online, batch, or simulation processing. If the student has an active FA term for the aid year (aid year processing) or term (term processing) and the career used for the SAP evaluation is not excluded by award type or career, the student is considered eligible for SAP evaluation, and the process attempts to create an SAP calculation or simulation.

Award Exclusions

For Award Exclusions, the system excludes if either the financial aid item type matches or the item type falls within the range defined by the Item Type From and Item Type To values on the Exclusions page.

You can list awards that are excluded from SAP evaluation:

- A student who has only the item types listed in the award exclusions setup is not selected for an SAP evaluation.
- A student who has both excluded item types and nonexcluded item types is selected for an SAP evaluation.
- If exclusions are set up with a financial aid type, but without values in the Item Type To and Item Type From fields, students who have awards only of that financial aid type are not selected for an SAP evaluation.

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Note. Award Exclusions are the only exclusions that affect whether or not a student is selected for an SAP Evaluation. Course and Grade exclusions affect the results of specific tests. Course Exclusions affect the results of the Maximum Attempted Units test. Grade Exclusions affect the Current Earned Units test and the Cumulative Earned Units test.

Standard SAP Selection, Student Override, and Population Selection

Use the one of three options to select IDs for SAP evaluation, Standard SAP Selection, Student Override, or Population Selection.

- If you use the Standard SAP Selection, all IDs for the associated career defined in the run control with the appropriate active FA Term data and award exclusion data for the term/aid year and career entered on the run control page are selected for an SAP evaluation. If you use the Student Override options or Population Selection option, the selection is limited to a subset of IDs.
- If you use the Student Override option, only the IDs entered in the override section of the run control page are reviewed to determine whether they have the appropriate active FA Term data and award exclusion data for the term/aid year and career entered on the run control page.
- If you use the Population Selection option, only the IDs provided by the Population Selection feature's input Selection Tool are reviewed to determine whether they have the appropriate active FA Term data and award exclusion data for the term/aid year and career entered on the run control page.
- If you use either the Student Override or Population Selection option:
  - If an ID meets the SAP Evaluation criteria, the process attempts to calculate an SAP Status for that ID.
  - If an ID does not meet the SAP Evaluation criteria, no SAP action is taken for that ID.

See lscc, Using the Population Selection Process.

Batch, Online, and Simulation Processes

The online and simulation SAP processes always run with the following options enabled:

- Use Pass 2 data.
- Run if a previous status for the same term/aid year exists.
- Do not create Report Data.
- Update any existing SAP data if any calculation value changes occur, even if the SAP status remains the same.
- Use Statuses and Actions rules when Pass 1 eligible.

  Therefore, ensure that all academic statuses are entered in the setup for Statuses and Actions rules, or the process might return an incorrect Calc SAP Status value.

In a batch process, these settings are optional and can be modified on the Process SAP run control page. To process SAP for a single student with different options than the online process uses, enter that ID in the Student Override section, and set the run control options as desired for that student.

Pass 1 and Pass 2 Evaluations

The SAP process evaluates SAP for each student two times, Pass 1 and Pass 2.

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Pass 2 is optional when running in batch, but is always used online or in simulation. In batch, if the Pass 2 option is selected, the process calculates for both Pass 1 and Pass 2, and uses the Pass 2 calculation results unless Pass 1 data is not present. When Pass 2 is used, Statuses and Actions rules are not used to determine a calculated SAP status.

Pass 1 and Pass 2 data collection differ as follows:

Pass 1	Pass 2
Pass 1 evaluates at the most recent SAP evaluated term/aid year where the fully graded date is less than or equal to today's date. If Statuses and Actions rules are enabled, they will be used to determine calculated SAP status. That is, the maximum term (term processing) or terms within the aid year (aid year processing) after the fully graded date is used for the SAP evaluation. Only Pass 1 calculations are compared to prior term or aid year SAP records. The current Calc SAP Status code is first compared to the Override SAP Status code, if it exists. If an Override SAP Status code does not exist in the previous SAP record, the current Calc SAP Status code is compared to the previous SAP status. For example, an institution that processes by term runs the SAP process for fall 2005. If the setup is defined to evaluate the spring 2005 term, and the fully graded date for spring 2005 has passed, the SAP process uses spring 2005 term data to evaluate the SAP tests and rules to determine the SAP status. If the spring 2005 fully graded date is in the future, then there is no Pass 1 evaluation for the student. The current Calc SAP Status code is first compared to the Override SAP Status code, if it exists. If an Override SAP Status code does not exist in the previous SAP record, the current Calc SAP Status code is compared to the previous SAP status. When complete, the processing message of Pass 1 is displayed in the Student SAP page and indicates the term used.	Pass 2 finds the most recent term/aid year that should be evaluated based on the evaluation term/aid year setup. If that term/aid year is not available for the student, Pass 2 uses data from the most recent term of enrollment even if that term of enrollment is not part of the evaluation term/aid year setup initially evaluated in Pass 1. Statuses and Actions rules are not used in the Pass 2 calculation An example using term processing: an institution runs the SAP process for fall 2005. If the setup is defined to evaluate the spring 2005 term, and no row exists for a student for spring 2005, but a row exists for fall 2004, the SAP process uses fall 2004 to evaluate the SAP tests and rules to determine the SAP status. An example using aid year processing: an institution runs the SAP process for 2005. If the setup is defined to evaluate the fall 2004, spring 2005 term and summer 2005 and no rows exists for a student for any of those terms, but a row exists for spring 2004, the SAP process uses spring 2004 to evaluate the SAP tests and rules to determine the SAP status. When complete, the processing message of Pass 2 is displayed in the Student SAP page and indicates the term used. If an Override SAP Status code exists, it is not removed.

Setting Up SAP

The SAP Setup pages are used to set up your rules that determine an SAP status for each of the eight tests. The rules are designed to be failure rules. If a student's actual test value matches a setup rule, the test fails. If a student's actual test value does not meet a rule, the student receives the Career Pass Default Status code for that test. For better processing performance, keep the rules as simple as possible.

Use the remaining setup pages to set up course and award exclusions, communications, and evaluation terms and aid years.

This section discusses how to:

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- Define SAP status codes.
- Set up rules for statuses and actions and the Academic Standing, Maximum Attempted Units, and Maximum Attempted Term tests.
- Set up tests for Minimum Current GPA, Minimum Cumulative GPA, Current Earned Units, Cumulative Earned Units, and Two Year GPA.
- Set up course, award, and grade exclusions.
- Set up SAP communications.
- Set up evaluation terms for aid year processing.
- Set up evaluation terms for term processing.
- Define SAP Application Engine libraries.

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Pages Used to Set Up SAP

Page Name	Definition Name	Navigation	Usage
Setup	SFA_SAP_STATUS_TBL	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup	Define SAP status codes, code severity, and default SAP status codes.
Criteria1	SFA_SAP_ACADST_TBL	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Criteria 1	Set up statuses and actions. Set up rules for quantitative tests: Academic Standing, Max Attempted Units, and Max Attempted Terms.
Criteria2	SFA_SAP_ACADST_TB2	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Criteria 2	Set up rules for qualitative tests: Minimum Current GPA, Minimum Cumulative GPA, Current Earned Units, Cumulative Earned Units, and Two Year GPA.
Exclusions	SFA_SAP_GRADEBS_EX	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Exclusions	Set up remedial and ESL course exclusions. Set up financial aid award exclusions. Set up grade exclusions.
Communications and Checklists	SFA_SAP_CMK_TBL	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Communications and Checklists	Set up codes and message text for communicating results of tests.
Define Evaluation Aid Year	SFA_SAP_ET_AYR	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Evaluation Aid Year	Set up terms for evaluation aid year processing.
Define Evaluation Terms	SFA_SAP_ET_TRM	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Evaluation Terms	Set up terms for evaluation term processing.
SAP AE Process Setup	SFA_SAP_AE_PROC	Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define SAP AE Library	Use delivered SAP processes for the eight tests, or create custom AE library sections for any of the eight SAP tests.

Defining SAP Status Codes

Access the Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup).

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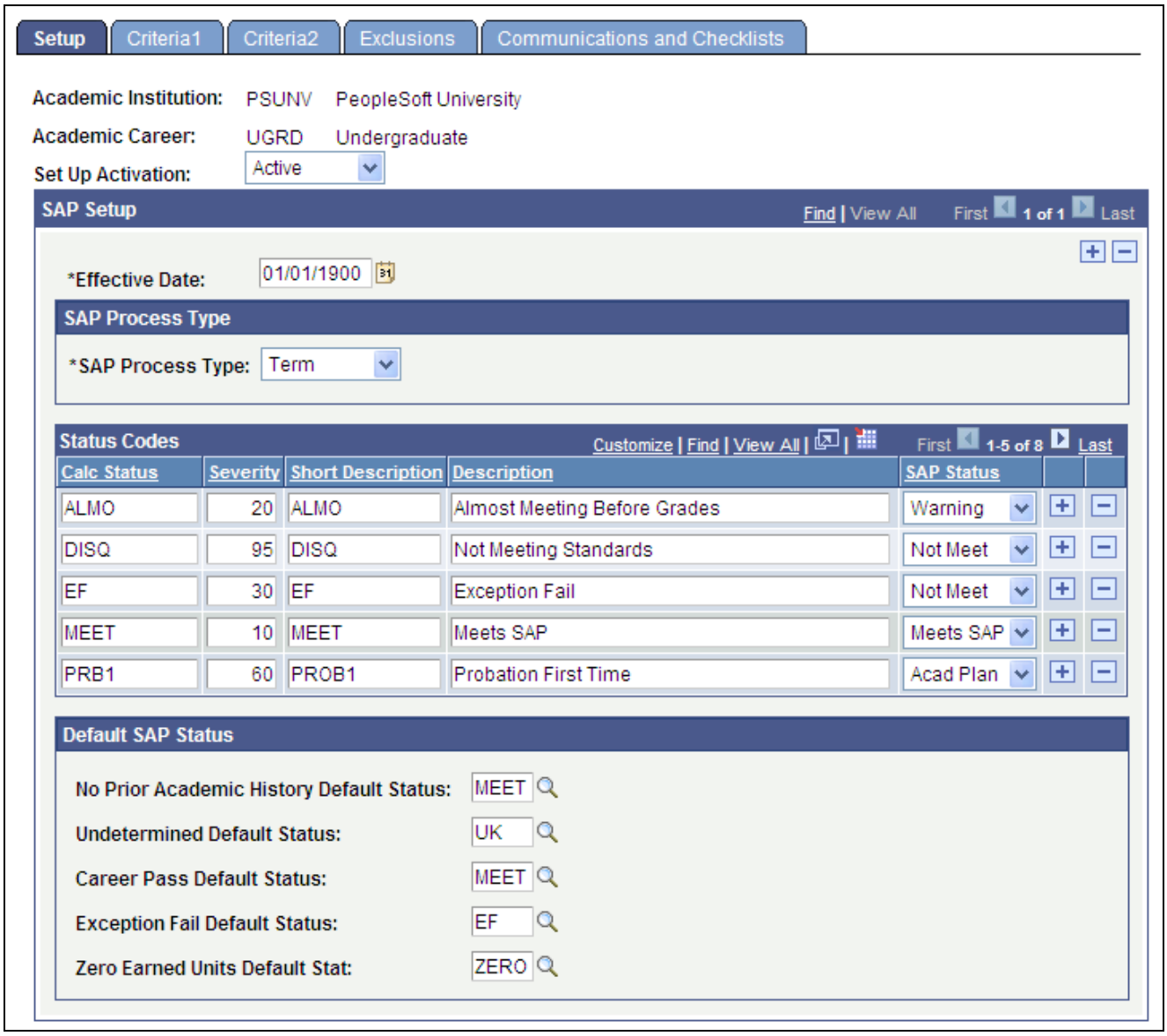

SAP Setup page

Use the Setup page to define, by institution and career, the SAP status codes and code severity, and how the SAP status updates the satisfactory academic progress value on the student's Packaging Status Summary page. To modify a status code, click the + icon to the right of the Effective Date field to create new setup criteria, and make the changes.

Ensure that this page is set up and saved before doing any further setup. Never delete SAP status codes after you start creating student SAP data because those codes would then be invalid in the Student SAP record.

The Set Up Activation field defines whether the SAP setup is active or inactive at this institution:

- When *any* of an Academic Institution's careers has a Setup Activation Field value of *Active*, students have a Satisfactory Academic Progress field on the Packaging Status Summary page that is display-only with the SAP Details link shown.
- When *all* of an Academic Institution's careers have a Setup Activation Field value of *Inactive* or are not defined, students have a Satisfactory Academic Progress field on the Packaging Status Summary page that is editable, and the SAP Details link is not shown.,

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- The online, batch, and simulation processes cannot run successfully for student SAP records in careers with a Setup Activation Field value of *Inactive.*

SAP Process Type

The two process types are *Aid Year* and *Term.* Although it is not recommended to change from one process type to the other, you can insert a new row at the Effective Date field level and update the setup. The value in the Effective Date field determines which row is used compared to the current date.

Aid year processing is for multiple terms, which you define on the Define Evaluation Aid Year page.

Term processing is for a single term, which you define on the Define Evaluation Term page.

Status Codes

It is important that your SAP status codes are relevant and define your student population. Be sure you have a code that represents a passing status, such as MEET.

Calc Status (calculated status)	Enter a four-character code for the default statuses, the calculated status for each test evaluation, and the overall status for the Statuses and Actions rules test.
Severity	Enter a number to control the priority of status codes and to determine the Calc SAP Status code for a student if the student has a different code for each test. The code with the highest severity number becomes the Calculated SAP Status code. Ensure that: • Each severity number is unique. • The most severe status code has the highest severity number assigned to it.
Short Description	Enter a brief description of the Calc Status code.
Description	Enter a detailed description of the Calc Status code.
SAP Status	Select a translate value to associate with Calc Status. The SAP Status is the status that appears in the Satisfactory Academic Progress field on the student's Packaging Status Summary page. To understand how these statuses are used by packaging and awarding: See lsfa, Preparing for Awarding and Packaging, Reviewing the Student's Packaging Status, Reviewing the Packaging Status Summary Page. • Academic Plan • Meets SAP • Not Meet • Probation • Undetrmine • Warning

Default SAP Status

The SAP evaluation process assigns these default statuses for particular cases, as described below. For each of these default statuses, select a status code that you defined in the Status Codes group box.

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No Prior Academic History Default Status

If a student does not have any prior student career term record data, this status is assigned.

Undetermined Default Status

If a calculation cannot be determined for a student due to missing information, this status is assigned to both the specific test and as the Overall Calculated SAP Status. Examples of missing information are:

- No Special GPA when the Use Special GPA Code option is selected.
- Academic Standing is blank.
- There is no cumulative or current GPA.

Career Pass Default Status

If a student does not meet the rules of a particular test, then this status is assigned. Also, if a student has been evaluated for other tests but has no fail statuses for those tests, this status is assigned as the Calc SAP status.

Exception Fail Default Status

If a student has had any career, term, or aid year test exceptions defined and the test fails using these exceptions, then this status is assigned. The process checks for student-specific exceptions first. If the student has exceptions defined and the process does not fail using those exceptions, it then assigns the Career Pass Default Status and the test rules are not evaluated.

It is recommended that the SAP Code associated with this default be the highest severity of the Not Meet status codes.

For more information about defining student-specific exceptions:

See lsfa, Satisfactory Academic Progress, Processing and Maintaining SAP.

Zero Earned Units Default Status

If a student's earned units is equal to 0 for either the Current Earned Units or Cumulative Earned Units calculation, this default status is assigned.

Setting Up Rules for Statuses and Actions and the Academic Standing, Maximum Attempted Units, and Maximum Attempted Term Tests

Access the Criteria1 page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Criteria 1).

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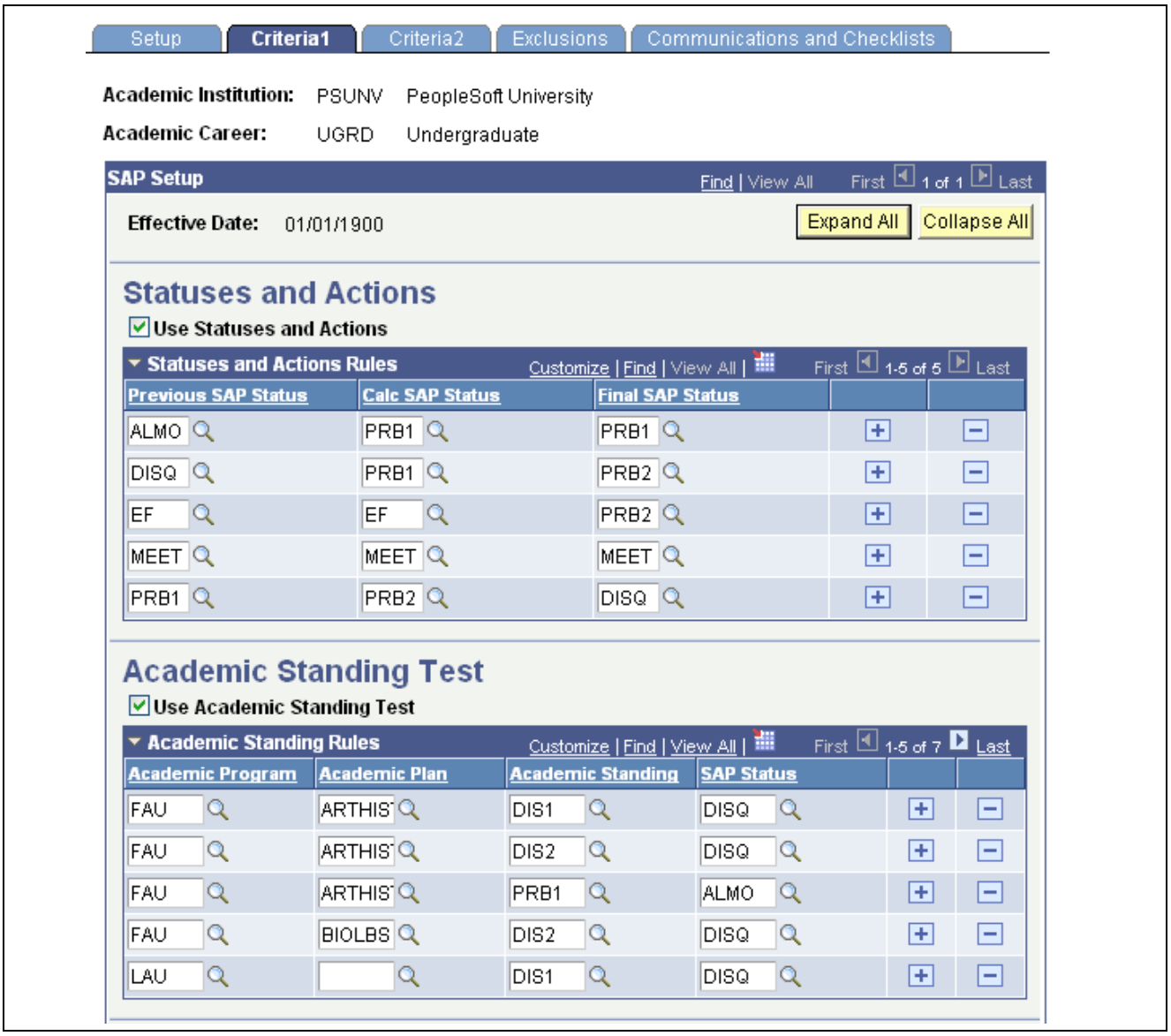

Criteria1 page (1 of 2)

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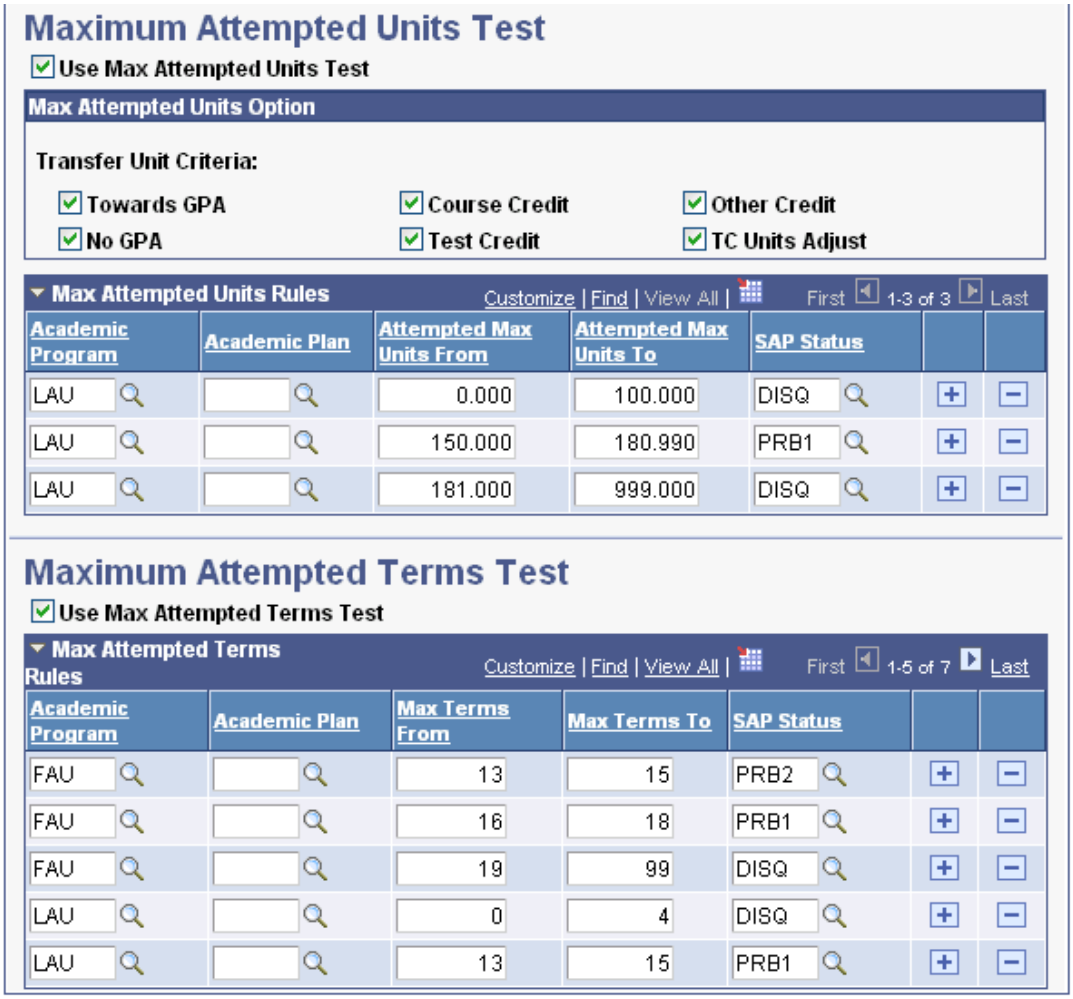

Criteria1 page (2 of 2)

Use the Criteria1 page to define your quantitative SAP requirements. You set up rules that determine how to set a final status based on a previously calculated status and a currently calculated status. You also set the rules and options for three of the eight SAP tests.

Click the Expand All button to expand all enabled tests and their corresponding rule grids for this effective dated row. Click the Collapse All button to collapse the tests. Or, use the expand/collapse arrow on each test to expand the grid for only that test.

Warning! You specify from-to ranges for attempted terms and units on this page. If the ranges overlap from one row to another in such a way that the system cannot determine only one SAP status for the specific rule for a particular Academic Program and Academic Plan, the Process SAP process abnormally ends with no results and the log indicates an SQL duplicate error. See specific warnings in the following field definitions.

Statuses and Actions

Select the Use Statuses and Actions check box to use this feature and set up rules. When using Statuses and Actions rules, make sure that all possible statuses and actions are set up. The Statuses and Actions rules feature is always executed for Pass 1 online process and is an option in batch, when enabled.

Previous SAP Status Select the most recently calculated term or aid year status value to be evaluated.

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Calc SAP Status (calculated SAP status)	Select the current SAP Calculated Status code.
Final SAP Status	Select the Overall SAP Status Code for term or aid year to be assigned if a student's Previous SAP Status and Calc SAP Status match the values selected in this row.

If the process cannot find a rule match for previous and calculated status, the final status that is generated may be incorrect. Therefore it is important to ensure that all possible statuses and actions are set up. Blank setup values are not allowed. Statuses and Actions rules are only evaluated for Pass 1 processing.

Academic Standing Test

The Academic Standing Rules group box indicates which academic standing values used by Academic Careers, Academic Program, and Academic Plan are not meeting Academic Standing and may be ineligible for financial aid. Students who meet the rules set up here are considered to fail this test, so write the rules with failing Academic Standing statuses and non-passing SAP Statuses.

Select the Use Academic Standing Test check box to set up rules for the Academic Standing test.

Academic Program	Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.
Academic Standing	Select an Academic Standing status in the context of the academic program (and academic plan, if selected) to associate with a SAP Status. If blank or a row for the term does not exist, the Undetermined Default Status code is used.
SAP Status	Select the SAP Status to use if the Academic Standing value from Student Records matches this setup.

Maximum Attempted Units Test

The Maximum Attempted Units test defines maximum units a student can attempt before their SAP status is affected. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the Use Max Attempted Units Test check box to set up rules for the Maximum Attempted Units test.

In the Max Attempted Units Option group box, select the transfer unit criteria to include in the maximum attempted unit total. You can select any combination of the following check boxes, or select none.

Towards GPA (towards grade point average)	Select this check box to include transfer units that were posted with grades defined as included in GPA in the maximum attempted units count.
No GPA (no grade point average)	Select this check box to include transfer units that were posted with grades defined as not to be included in the GPA maximum attempted units count.
Course Credit	Select this check box to include transfer units that were posted to be course credit and not grade credit toward GPA maximum attempted units count.

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Test Credit Select this check box to include test credits in the maximum attempted units count.

Other Credit Select this check box to include other credits in the maximum attempted units count.

TC Units Adjust (transfer credit units adjust) Select this check box to subtract TC Units Adjust amount from the maximum attempted units count.

Academic Program Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.

Academic Plan Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.

Attempted Max Units From (attempted maximum units from) Enter the starting number for the range of attempted units that a student can attempt for a corresponding status code. The numbers are inclusive. If 100 is the starting number, it is included in the range.

Warning! The Attempted Max Units From field and Attempted Max Units To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same academic program or academic plan. Your number ranges can overlap if they apply to different academic programs or academic plans.

Attempted Max Units To (attempted maximum units to) Enter the ending number for the range of attempted units that a student can attempt for a corresponding status code. The numbers are inclusive. If 100 is the ending number, it is included in the range.

SAP Status Select the SAP status code to use when the student's attempted units value falls within the range of this rule. The ranges and statuses set here are to find students who are not making progress.

Maximum Attempted Terms Test

The Maximum Attempted Terms test defines the maximum terms a student can enroll in before their SAP status is affected. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the Use Max Attempted Terms Test check box to set up rules for the Maximum Attempted Terms test.

Academic Program Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.

Academic Plan Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.

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Max Terms From (maximum terms from)

Enter the starting number for the range of terms that a student can enroll for a corresponding status code. The numbers are inclusive. If 10 is the starting number, it is included in the range.

Warning! The Max Terms From field and Max Terms To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans.

Max Terms To (maximum terms to)

Enter the ending number for range of terms a student can enroll for a corresponding status code. The numbers are inclusive. If 10 is the ending number, it is included in the range.

SAP Status

Select the SAP status code to use when the student's attempted terms value falls within the range of this rule. The ranges and statuses set here are to find students who are not making progress.

Setting Up Tests for Minimum Current or Cumulative GPA, Current or Cumulative Earned Units, and Two-Year GPA

Access the Criteria2 page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Criteria 2).

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Setup | Criteria1 | **Criteria2** | Exclusions | Communications and Checklists

Academic Institution: PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

SAP Setup Find | View All First 1 of 1 Last

Effective Date: 01/01/1901 Expand All Collapse All

Minimum Current GPA Test

☑ **Use Min Current GPA Test**

Use Special GPA Code:

Minimum Current GPA Rules Customize | Find | View All | First 1-3 of 3 Last

Academic Program	Academic Plan	Cum Earned Units From	Cum Earned Units To	Min Cur GPA From	Min Cur GPA To	SAP Status
FAU		0.010	999.990	1.001	1.890	DISQ
FAU		0.010	999.990	1.900	1.990	PRB2
LAU		0.010	100.000	0.000	1.999	DISQ

Minimum Cumulative GPA Test

☑ **Use Min Cumulative GPA Test**

Use Special GPA Code:

Minimum Cumulative GPA Rules Customize | Find | View All | First 1-5 of 7 Last

Academic Program	Academic Plan	Cum Earned Units From	Cum Earned Units To	Minimum Cum GPA From	Minimum Cum GPA To	SAP Status
		0.000	100.000	0.000	1.999	DISQ
FAU		130.000	150.000	0.010	1.790	DISQ
FAU		151.000	180.000	0.010	1.900	DISQ
FAU		181.000	999.990	1.990	2.000	DISQ
LAU		0.000	30.000	0.010	1.990	PRB1

Criteria2 page (1 of 3)

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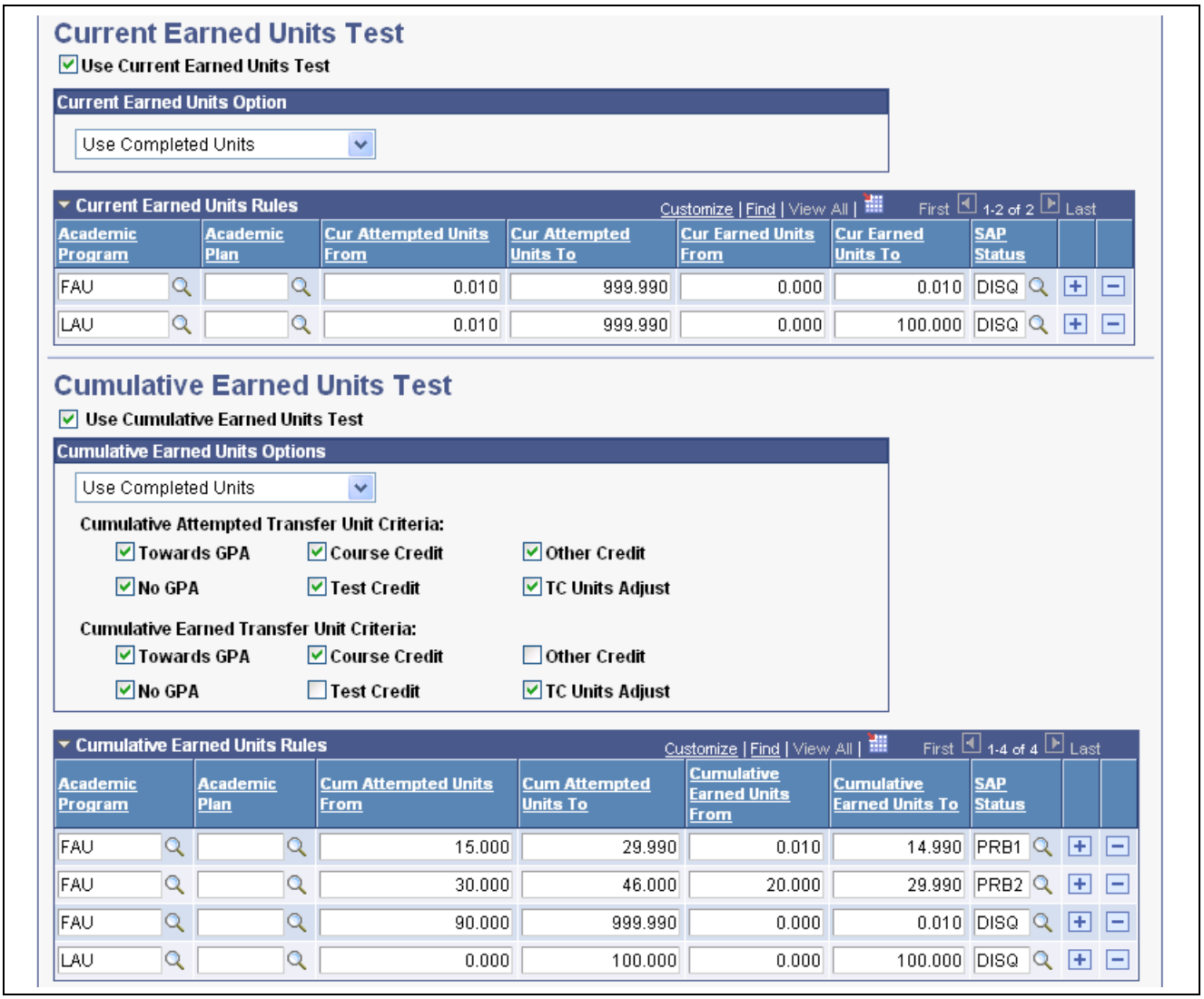
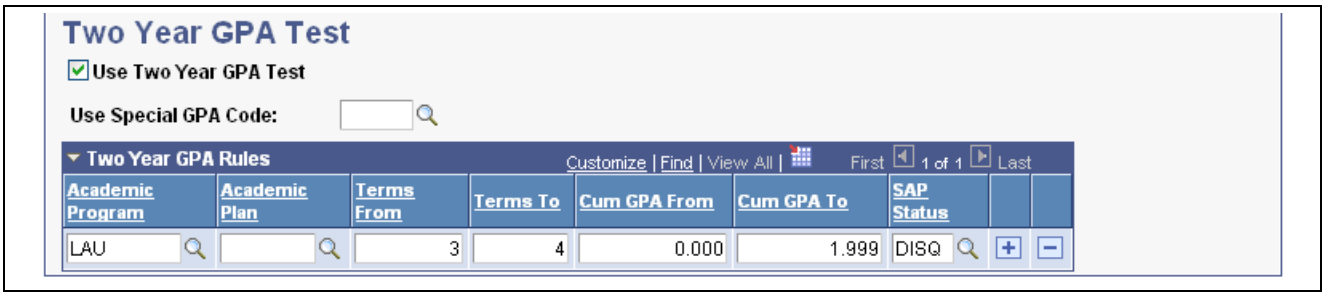


Criteria2 page (2 of 3)



Criteria2 page (3 of 3)

Use the Criteria2 page to define your qualitative SAP requirements and the rules for four of the eight SAP tests.

Click the Expand All button to expand all enabled tests and their corresponding rule grids for this effective dated row. Click the Collapse All button to collapse the tests. Or, use the expand or collapse arrow on each test to expand the grid for only that test.

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Warning! You specify from-to ranges for the five tests on this page. If the ranges overlap from one row to another in such a way that the system cannot determine only one SAP status for the specific rule for a particular Academic Program and Academic Plan, the Process SAP process abnormally ends with no results and the log indicates an SQL duplicate error. See specific warnings in the following field definitions.

Minimum Current GPA Test

The Minimum Current GPA test determines the lowest current GPA that a student can have and still be eligible for financial aid. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the Use Min Current GPA Test check box to set up rules for the Minimum Current GPA test.

Use Special GPA Code

Select a value in this field to use a student's Special GPA for comparison in SAP processing. If you do not select a code, the student's current GPA is used.

If the Special GPA field is populated, but does not exist, the Undetermined Default Status code is used.

Academic Program

Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.

Academic Plan

Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are*only* evaluated for those specific rules.

Cum Earned Units From (cumulative earned units from)

Enter the minimum value of the range of earned (passed) units to identify the minimum GPA range used to determine which SAP status should be used.

Warning! The Cum Earned Units From field and Cum Earned Units To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same academic program or academic plan. Your number ranges can overlap if they apply to different academic programs or academic plans or if your minimum current GPA range is different between rows.

Cum Earned Units To (cumulative earned units to)

Enter the maximum value of the range of earned (passed) units to identify the minimum GPA range used to determine the SAP status.

Min Cur GPA From (minimum current GPA from)

Enter the minimum value of the range of minimum current GPA used to determine the SAP status.

Warning! The Min Cur GPA From field and Min Cur GPA To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative earned units range is different between rows.

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Min Cur GPA To (minimum current GPA to)

Enter the maximum value of the range of Minimum Current GPA used to determine the SAP status.

SAP Status

Select the SAP Status code to use if a student meets the rules of this test. The ranges and statuses set here are to find students who are not making progress.

Minimum Cumulative GPA Test

The Minimum Cumulative GPA test determines the lowest cumulative GPA that a student can have and still be eligible for financial aid. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the Use Min Cumulative GPA Test check box to set up rules for the Minimum Cumulative GPA test.

Use Special GPA Code

Select a value in this field to use a student's special GPA for comparison in SAP processing. If you do not select a code, the student's current GPA is used.

If the Special GPA field is populated, but does not exist, the Undetermined Default Status code is used.

Academic Program

Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.

Academic Plan

Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are*only* evaluated for those specific rules.

Cum Earned Units From (cumulative earned units from)

Enter the minimum value of the range of earned (passed) units to identify the minimum GPA range used to determine the SAP status.

Warning! The Cum Earned Units From field and Cum Earned Units To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your minimum cumulative GPA range is different between rows.

Cum Earned Units To (cumulative earned units to)

Enter the maximum value of the range of earned (passed) units to identify the minimum GPA range used to determine the SAP status.

Minimum Cum GPA From (minimum cumulative GPA from)

Enter the minimum value of the range of minimum cumulative GPA used to determine the SAP status.

Warning! The Minimum Cum GPA From field and Minimum Cum GPA To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative earned units range is different between rows.

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Minimum Cum GPA To (minimum cumulative GPA to)	Enter the maximum value of the range of minimum cumulative GPA used to determine the SAP status.
SAP Status	Indicate which SAP Status code to use if a student meets the rules of this test. The ranges and statuses set here are to find students who are not making progress.

Current Earned Units Test

The Current Earned Units test evaluates the student's attempted units and earned units and compares the quotient (earned/attempted) to the rules. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses. Define the percent or minimum number of current term or aid year units a student must complete of attempted units per term.

Select the Use Current Earned Units Test check box to set up rules for the Current Earned Units test.

In the Current Earned Units Option list, select whether to use percentage or units:

- Select *Use Percentage* to use the percentage of completed units for the current term or aid year.
- Select *Use Completed Units* to use a minimum number of units to be completed for the current term, by term or aid year.

Fields for the Current Earned Units test change depending on the option that you select. For example, if you select *Use Percentage*, the Cur Earned Units % From and Cur Earned Units % To fields appear.

Academic Program	Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the Academic Planfield for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.
Cur Attempted Units From (current attempted units from)	Enter the minimum current value of the range of attempted units to identify the minimum percentage or number range used to determine the SAP status. ***Warning!*** The Cur Attempted Units From field and Cur Attempted Units To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your current earned units (% or number) range is different between rows.
Cur Attempted Units To (current attempted units to)	Enter the maximum current value of the range of attempted units to identify the maximum percentage or number range used to determine the SAP status.

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Cur Earned Units % (or Number) From (current earned units percentage [or number] from)

Enter the minimum value of the range of current earned (passed) percentage or number used to determine the SAP status.

Warning! The Cur Earned Units % (or Number) From field and Cur Earned Units % (or Number) To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your current attempted units range is different between rows.

Cur Earned Units % (or Number) To (current earned units percentage [or number] to)

Enter the maximum value of the range of current earned (passed) percentage or number used to determine the SAP status.

SAP Status

Select the SAP status code to use if a student meets the rules of this test. If the student has zero completed units, the Zero Earned Default Status is used. The ranges and statuses set here are to find students who are not making progress.

Cumulative Earned Units Test

For the Cumulative Earned Units test, you define the percent or minimum number of units a student must complete of attempted units per term. Students who meet the rules set up here are considered to fail this test, so write the rules with failing ranges and nonpassing SAP statuses.

Select the Use Cumulative Earned Units Test check box to set up rules for the Cumulative Earned Units test.

In the Use Cumulative Earned Units Options drop-down list, select whether to use percentage or completed units for term or aid year processing:

- *Use Percentage:* Use the percentage of completed units for the current term or aid year.
- *Use Completed Units:* Use a minimum number of units to be completed.

For Cumulative Attempted Transfer Unit Criteria, select the transfer unit criteria check boxes to include in the cumulative attempted unit total. You can select any combination of boxes, or select none.

Towards GPA (towards grade point average)

Select this check box to include transfer units that were posted with grades defined to be included in GPA in the cumulative attempted units count.

No GPA (no grade point average)

Select this check box to include transfer units that were posted with grades defined to not be included in GPA cumulative attempted units count.

Course Credit

Select this check box to include transfer units that were posted to be course credit and not grade credit toward GPA cumulative attempted units count.

Test Credit

Select this check box to include test credits in the cumulative attempted units count.

Other Credit

Select this check box to include other credits in the cumulative attempted units count.

TC Units Adjust (transfer credit units adjust)

Select this check box to subtract TC Units Adjust amount from the cumulative attempted units count.

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For Cumulative Earned Transfer Unit Criteria, select the transfer unit criteria check boxes to include in the cumulative earned unit total. You can select any combination of boxes, or select none.

Towards GPA (towards grade point average)	Select this check box to include transfer units that were posted with grades defined to be included in GPA in the maximum attempted units count.
No GPA (no grade point average)	Select this check box to include transfer units that were posted with grades defined to not be included in GPA maximum attempted units count.
Course Credit	Select this check box to include transfer units that were posted to be course credit and not grade credit toward GPA maximum attempted units count.
Test Credit	Select this check box to include test credits in the maximum attempted units count.
Other Credit	Select this check box to include other credits in the maximum attempted units count.
TC Units Adjust (transfer credit units adjust)	Select this check box to subtract TC Units Adjust amount from the maximum attempted units count.
Academic Program	Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.
Academic Plan	Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.
Cum Attempted Units From (cumulative attempted units from)	Enter the cumulative minimum value for the range of attempted units (minimum percentage or number range) used to determine the SAP status. ***Warning!*** The Cum Attempted Units From field and Cum Attempted Units To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative earned units (% or number) range is different between rows.
Cum Attempted Units To (cumulative attempted units to)	Enter the cumulative maximum value for the range of attempted units (minimum percentage or number range) used to determine the SAP status.
Cumulative Earned Units % (or Number) From (cumulative earned units percentage [or number] from)	Enter the minimum value of the range of cumulative earned (passed) percentage or number used to determine the SAP status. ***Warning!*** The Cum Earned Units % (or Number) From field and Cumulative Earned Units % (or Number) To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with each other or with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative attempted units range is different between rows.

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Cumulative Earned Units % (or Number) To (cumulative earned units percentage [or number] to)

Enter the maximum value of the range of cumulative earned (passed) percentage or number used to determine the SAP status.

SAP Status

Select the SAP Status code to use if a student meets the rules of this test. If the student has zero completed units, the Zero Earned Default Status is used. The ranges and statuses set here are to find students who are not making progress.

Two Year GPA Test

Select the Use Two Year GPA Test check box to set up rules for the Cumulative Earned Units test.

Use Special GPA Code

Select a value in this field to use a student's Special GPA for comparison in SAP processing. If you do not select a code, the student's current GPA is used.

If the Special GPA field is populated, but does not exist, the Undetermined Default Status code is used.

Academic Program

Select a value in the Academic Program field for an additional level of evaluation. If this field is populated, and the Academic Plan field is blank, the rule is used for all students with that academic career and academic program.

Academic Plan

Select a value in the Academic Plan field for the most specific level of evaluation. If this field is populated, all students with this academic career, academic program, and academic plan are *only* evaluated for those specific rules.

Terms From

Enter the starting number for the range of terms that a student can attempt for a corresponding status code. The numbers are inclusive. If 10 is the starting number, it is included in the range.

Warning! The Terms From field and Terms To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your cumulative GPA range is different between rows. The Terms From value can be the same as the Terms To value within the same row.

Terms To

Enter the ending number for range of terms a student can attempt for a corresponding status code. The numbers are inclusive. If 10 is the ending number, it is included in the range.

Cum GPA From (cumulative GPA from)

Enter the beginning value of the range of cumulative GPA used to determine the SAP status.

Warning! The Cum GPA From field and Cum GPA To field create a range of numbers applied to a rule that defines an SAP status. Ensure that the numbers do not overlap with a range in another row that defines a different status for the same Academic Program or Academic Plan. Your number ranges can overlap if they apply to different Academic Programs or Academic Plans or if your terms range is different between rows.

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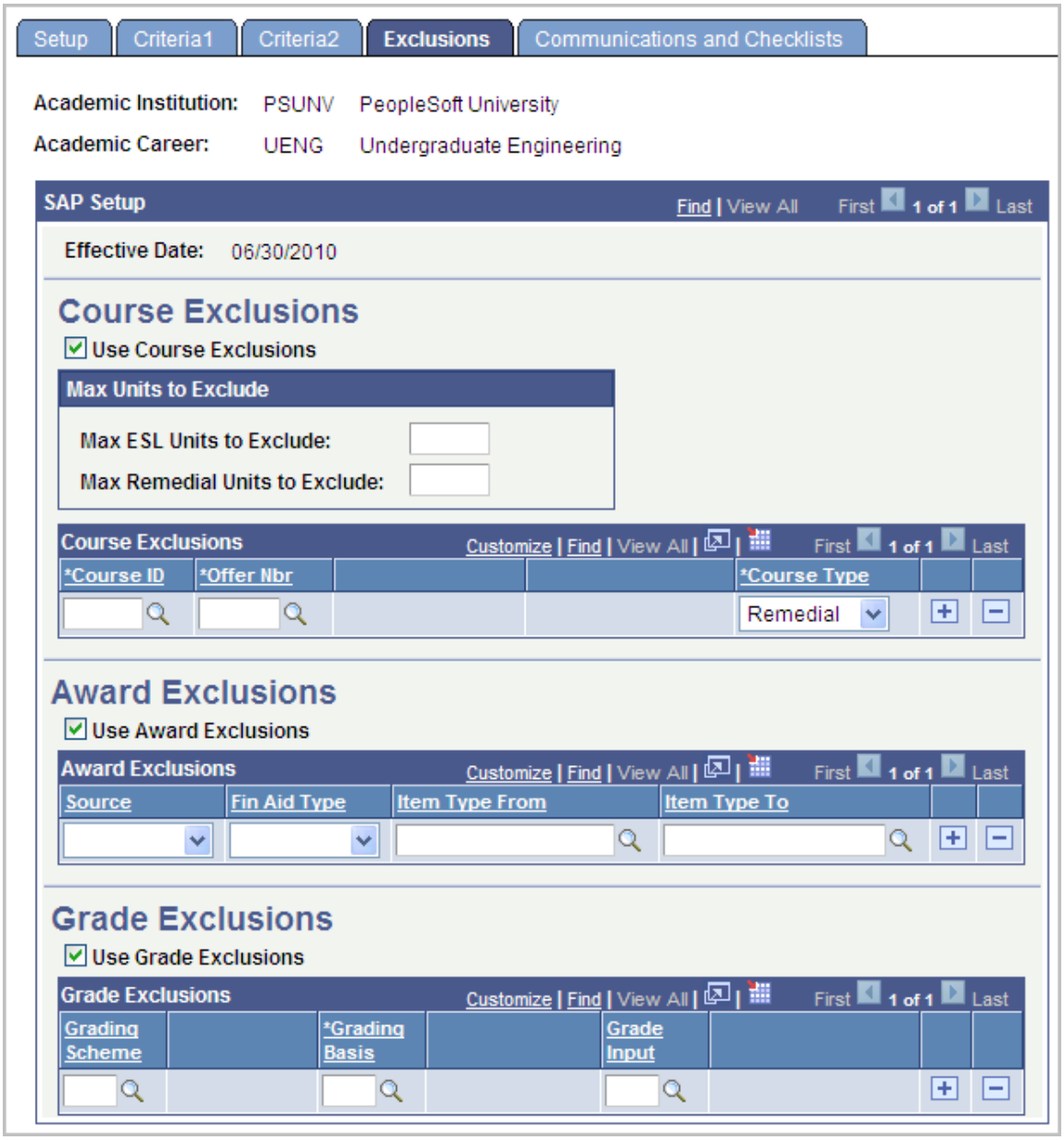
Cum GPA To (cumulative GPA to)	Enter the ending value of the range of cumulative GPA used to determine the SAP status.
SAP Status	Select the SAP Status code to use if a student meets the rules of this test. If the student has zero completed units, the Zero Earned Default Status is used. The ranges and statuses set here are to find students who are not making progress.

Setting Up Course, Award, and Grade Exclusions

Access the Exclusions page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Exclusions).



SAP Exclusions page

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Use the Exclusions page to identify English as a Second Language (ESL) and remedial courses for exclusions and place caps on the number of ESL and remedial courses to exclude for calculating Maximum Attempted Units. Identify student records to exclude from the SAP selection process based on types of awards and/or identify grades to exclude from cumulative and current earned units calculation.

Course Exclusions

Course Exclusions are used in the Maximum Attempted Units Test to identify ESL and remedial courses that should be excluded in the count and to also place caps on the number of ESL and remedial courses to exclude from the unit count.

Select the *Use Course Exclusions* check box to set up rules for Max Units to Exclude and Course Exclusions.

The Max Units to Exclude (maximum units to exclude from all course exclusions) group box has two selections.

Max ESL Units to Exclude (maximum ESL units to exclude)	Enter the maximum number of units to be excluded from the Maximum Attempted Units test regardless of number attempted. If no limit exists for the number that can be excluded, leave the field blank. If a student has more ESL units than the maximum set here, only the maximum number is excluded. There must be at least one course entered with the Course Type of *ESL* in the Course Exclusions grid for this maximum to be invoked.
Max Remedial Units to Exclude (maximum remedial units to exclude)	Enter the maximum number of units to be excluded from the Maximum Attempted Units test regardless of number attempted. If no limit exists for the number that can be excluded, leave the field blank. If a student has more remedial units than the maximum set here, only the maximum number is excluded. There must be at least one course entered with the course type of *Remedial* in the Course Exclusions grid for this maximum to be invoked.

Course Exclusions are criteria for excluding courses from the Maximum Attempted Units test. Excluded courses include Remedial courses or ESL courses.

Course ID	Select the course ID of the class to exclude from the Maximum Attempted Units test calculation regardless of grade.
Offer Nbr (offer number)	Select the course offer number of each class to exclude from the Maximum Attempted Units test calculation regardless of grade. To totally exclude the class, the course offer number must be included.
Course Type	Select the type of class, *Remedial* or *ESL*.

Award Exclusions

Award Exclusions are criteria for excluding students from the selection for an SAP evaluation based on an aid type or specific awards you specify.

Select the Use Award Exclusions check box to use this function.

Source	Select a fund source. This field is informational only. There is no system logic using this selection.
Fin Aid Type (financial aid type)	Select a financial aid type to exclude students who only have awards with that financial aid type from the SAP evaluation selection.

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Item Type From and **Item Type To**	Select the beginning and end of a range of financial aid item types, to exclude students who have awards from only those item types, from the SAP evaluation selection.

Grade Exclusions

Grade Exclusions are criteria for excluding course units with specific grading schemes, grading basis, and grade input values from the Current Earned Unit and/or Cumulative Earned Units tests.

If you use Grade Exclusions, the Current and Cumulative Earned Units values are derived from the student's enrollment, minus the units to be excluded. If you do not use Grade Exclusions, the Current and/or Cumulative Units value is derived from the student's Career Term data.

You must set up any and all course grades that you do not want to be counted toward earned units, including Failing grades.

Warning! Some schools may have "blank" grading schemes in Student Enrollment as a result of migrating to CS 8.9 or 9.0 from earlier versions. If you have grades intended to be excluded that fall in this category, you must enter them in the Grade Exclusion setup as 'blank' Grading Schemes with the associated Grading Basis and Grade Input.

Select the Use Grade Exclusions check box to use this function.

Grading Scheme	Enter the Grading Scheme to be used to define the Grading Basis and Grade Input for exclusion from the Current Earned Unit and/or Cumulative Earned Units tests.
Grading Basis	Enter the Grading Basis to be used to define the Grade Input for exclusion from the Current Earned Unit test, the Cumulative Earned Units test, or both tests.
Grade Input	Enter the Grade Input to be excluded from the Current Earned Unit and/or Cumulative Earned Units tests.

Setting Up SAP Communications

Access the Communications and Checklists page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Communications and Checklists).

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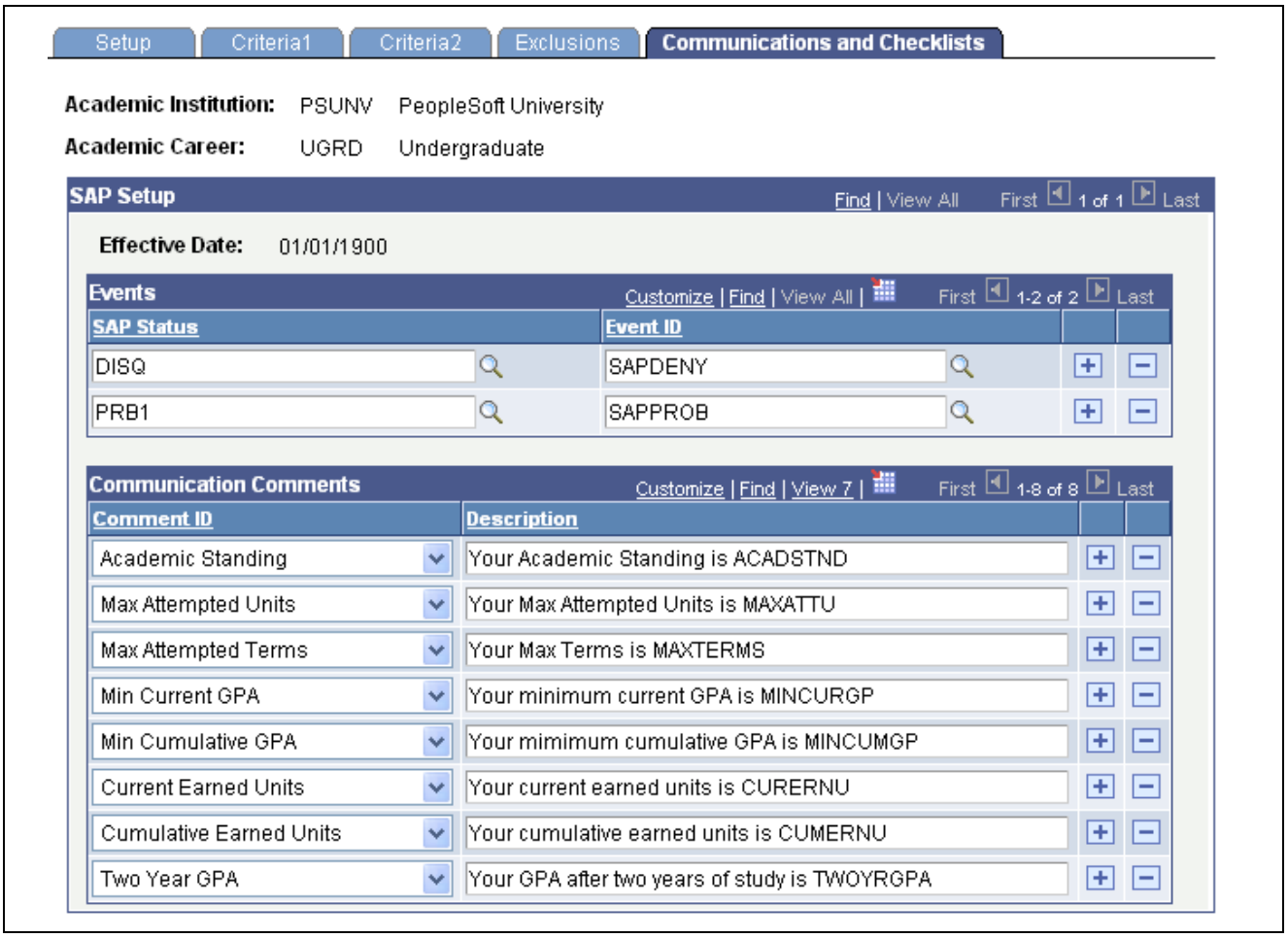

Communications and Checklists page

The Create SAP Communications process updates the 3C Trigger table in Campus Community. This process utilizes two Administrative Functions, FINA and FINT, depending on the SAP processing type. Aid Year processing SAP data requires the use of the FINA Administrative Function, which consists of the variable data field of Aid Year. Term processing SAP data requires the use of the FINT Administrative Function which consists of the variable data fields Aid Year and Term.

When setting up SAP Communications in Campus Community each processing type (Aid Year and Term) must have its own separate, unique communications set up. You must set up your communications to use the correct Administrative Function for the processing type; otherwise the 3C Engine will not create the communications correctly.

See lscc, Using the 3C Engine.

See [Setting Up Communications]Setting Up Communications.

See [Managing Communications]Managing Communications.

Events

SAP Status Select the SAP status code.

Event ID Select the event ID. The event ID contains the Communication and Checklist Code/Item to be assigned and is set up under Campus Community.

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See lscc, Managing Campus Event Planning, Creating an Event, Naming an Event.

Communication Comments

Comment ID

Select an SAP Test for which you want comments inserted into the 3C Trigger table.

Comment ID values are associated with the eight SAP tests. If the comment ID for a particular test is set up here, the SAP 3C process generates a comment in the 3C Trigger table by student for each test that the student has failed.

If the student fails multiple tests, multiple comments are appended into one comment and inserted into the communication comment field on the 3C Trigger table.

Description

Enter the text for the comment ID in this free-form field to create specific messages to students who fail one of the eight SAP evaluation tests.

To include the student's actual failed data value from the Student SAP page in the comment, use the desired Hardcode Variable from the following table when entering your comment text.

Comment ID and Variables

The following table details the Comment ID values, variables, and examples of Description entries and resulting comments. The Comment ID values are the same as the field names from the Actualcolumn on the Student SAP page.

Comment ID	Hardcode Variable	Example Description	Example Comment
Academic Standing	ACADSTND	Your current academic standing is ACADSTND.	Your current academic standing is DISQ.
Cumulative Earned Units	CUMERNU	The cumulative unit amount you have earned, CUMERNU, does not meet our requirements.	The cumulative unit amount you have earned, 19.000, does not meet our requirements.
Current Earned Units	CURERNU	CURERNU is the amount of your current earned units.	8.000 is the amount of your current earned units.
Max Attempted Terms	MAXTERMS	The number of terms you have attempted at PeopleSoft University is MAXTERMS.	The number of terms you have attempted at PeopleSoft University is 10.000.
Max Attempted Units	MAXATTU	You have attempted MAXATTU units at PeopleSoft University.	You have attempted 12.00 units at PeopleSoft University.
Min Cumulative GPA	MINCUMGP	Your cumulative GPA is MINCUMGP.	Your cumulative GPA is 1.125.
Min Current GPA	MINCURGP	Your GPA for fall semester is MINCURGP; this does not meet university requirements.	Your GPA for fall semester is 1.013; this does not meet university requirements.
Two Year GPA	TWOYRGPA	Your GPA after two years of study is TWOYRGPA.	Your GPA after two years of study is 1.109.

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Setting Up Evaluation Terms for Aid Year Processing

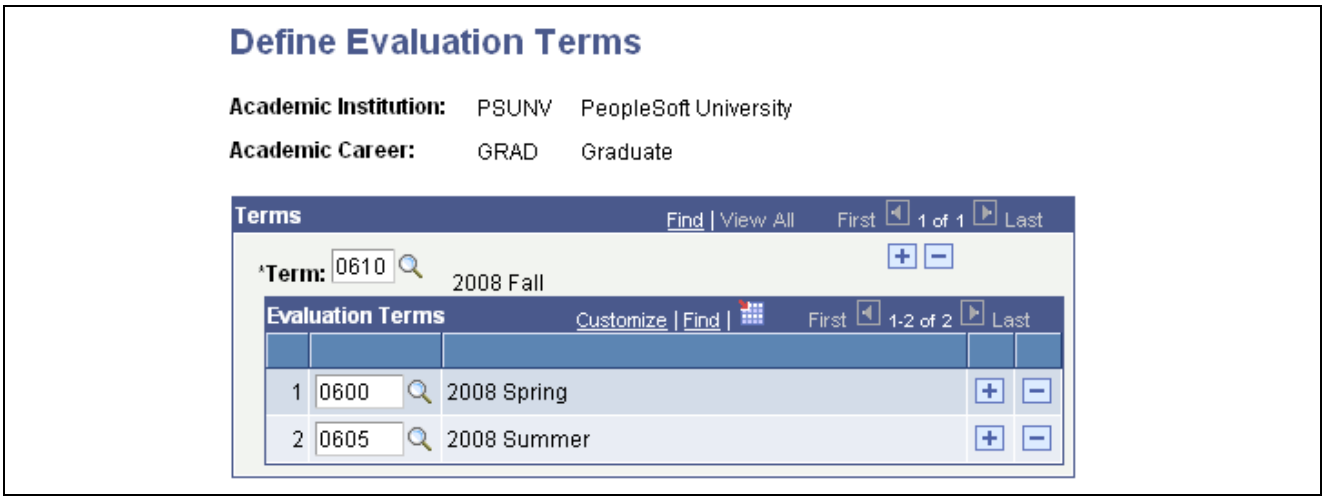
Access the Define Evaluation Aid Year page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Evaluation Aid Year).

Define Evaluation Aid Year page

Use this page to select terms for aid year processing for the selected aid year. The Evaluation Terms field prompts a list of all terms defined at your institution.

Setting Up Evaluation Terms for Term Processing

Access the Define Evaluation Terms page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Evaluation Terms).



Define Evaluation Terms page

Use this page to select terms for term processing for the selected aid year. The Evaluation Terms field prompts a list of all terms defined at your institution.

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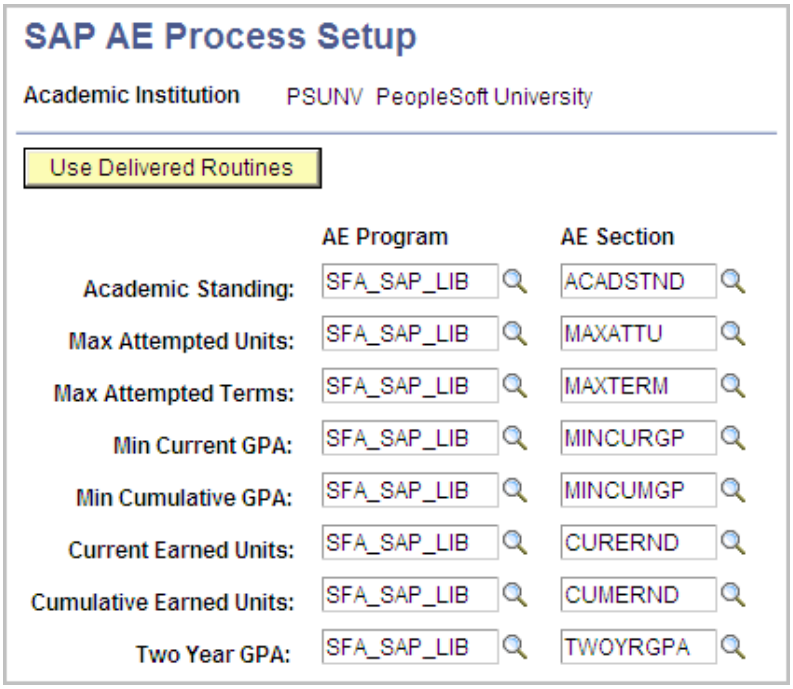
Defining SAP Application Engine libraries.

Access the SAP AE Process Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define SAP AE Library).



SAP AE Process Setup page

Use this page to specify which Application Engine application library sections you want to use for each of the eight SAP test.

The SAP feature was designed and structured to be a modular program. Each of the eight delivered SAP tests is enclosed in its own Application Engine application library section. You can implement custom AE library sections to perform the desired SAP test logic for any of the eight SAP tests instead of using the delivered AE library sections.

Use Delivered Routines	Click this button to reset all of the AE Program and AE Sections to the delivered definitions.
AE Program Application Engine program	This value defaults to the delivered program. If you have created a custom Application Engine program for this test, enter the value here.
AE Section Application Engine section	This value defaults to the delivered program. If you have created a custom Application Engine application library section for this test, enter the value here after selecting the Application Engine program.

For more information on customizing the eight SAP tests:

See Campus Solutions 9.0 Customizing SAP Developers Guide on My Oracle Support, ID 1155793.1

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Processing and Maintaining SAP

This section discusses how to:

- Run the SAP batch process.
- Maintain student SAP.
- View the Satisfactory Academic Progress field.
- Define student-specific career exceptions.
- Define student-specific aid year exceptions or term exceptions.
- Create SAP communications.
- Simulate a student SAP calculation.
- Review students from a batch run.

Note. When running an online, batch, or simulated SAP process, there must be an active FA Term row for either the aid year or the term being processed. Also, ensure that the Set Up Activation field is set to *Active* on the Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup).

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Pages Used to Process and Maintain SAP

Page Name	Definition Name	Navigation	Usage
Process SAP	SFA_RUN_SAP	Financial Aid, Satisfactory Academic Progress, Process SAP	Run the batch SAP process. The setup must have a status of active for the process to execute successfully.
Student SAP	SFA_SAP_STDNT	Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Student SAP	Run the SAP process for an individual student, view SAP calculated values, set student level exclusions, and set the use of the Override SAP Status. The setup must have a status of active for the process to execute successfully.
Packaging Status Summary	STDNT_AID_PACKAGE	Click the Packaging Status Summary link from the Student SAP page.	View the Satisfactory Academic Progress field value.
Career Exceptions	SFA_SAP_STDNT2	Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Career Exceptions	Define exceptions at the student level.
Term Exceptions (Page visibility depends on SAP Career level setup)	SFA_SAP_STDNT3	Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Term Exceptions	Define exceptions at the student level for term processing.
Aid Year Exceptions (Page visibility depends on SAP Career level setup)	SFA_SAP_STDNT4	Financial Aid, Satisfactory Academic Progress, Aid Year Exceptions	Define exceptions at the student level for aid year processing.
Create SAP Communications	SFA_RUN_SAP3C	Financial Aid, Satisfactory Academic Progress, Create SAP Communications	Set up event triggers for 3C communications.
Simulate Student Eligibility	SFA_SAP_STDNT_SIM	Financial Aid, Satisfactory Academic Progress, Simulate Student Eligibility	Simulate SAP status processing without saving data.
Review Report Data	SFA_SAP_RPT	Financial Aid, Satisfactory Academic Progress, Review Report Data	Store batch SAP status details by run control IDs.

Running the SAP Batch Process

Access the Process SAP page (Financial Aid, Satisfactory Academic Progress, Process SAP).

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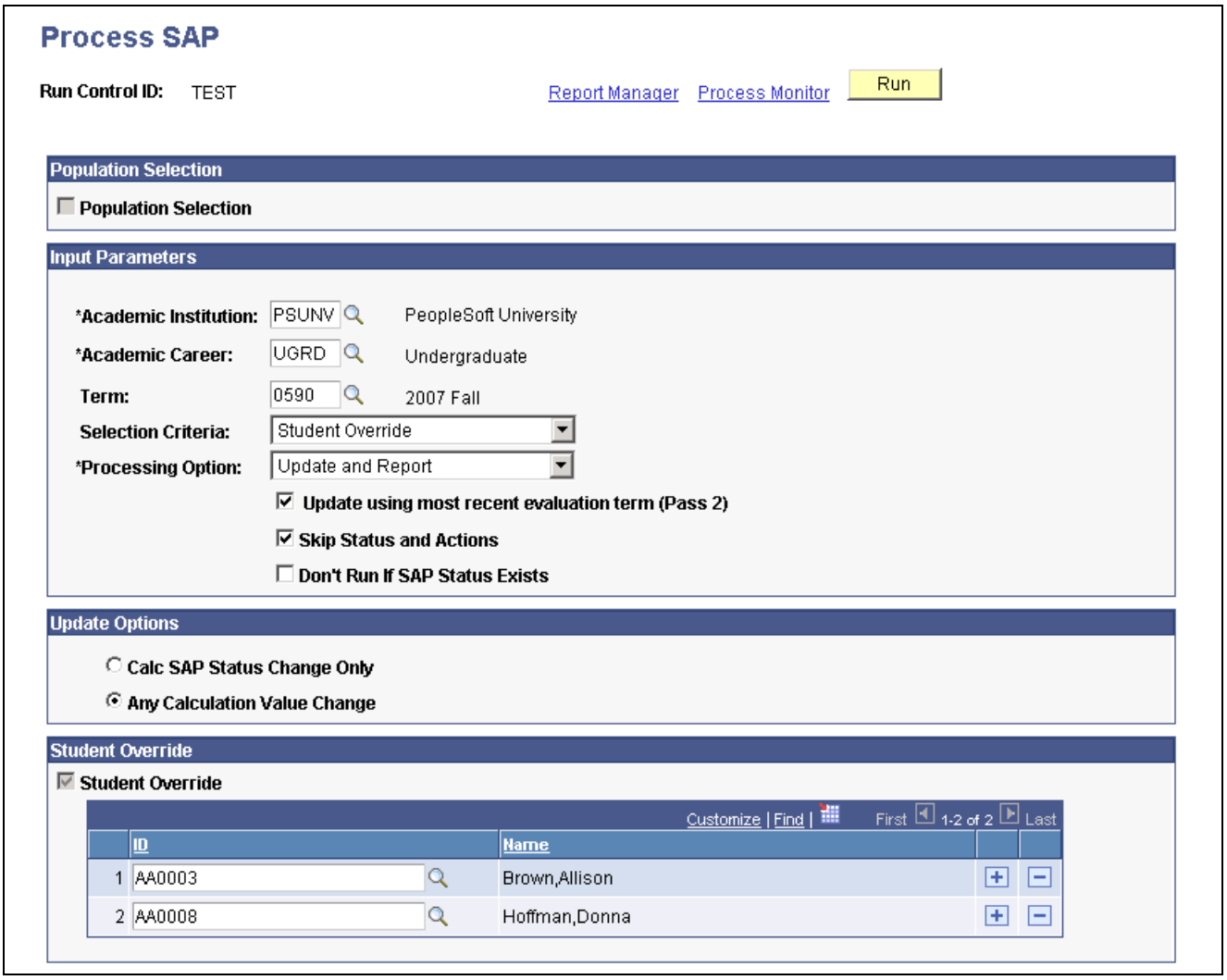

Process SAP page

Before running the SAP process, ensure that the Set Up Activation field is set to *Active* on the Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup).

Population Selection

The Population Selection check box is selected or cleared, depending on the value in the Selection Criteria field in the Input Parameters group box on this page. When the check box is selected, population selection options appear in the Population Selection group box.

For more information on population selection:

See lscc, Using the Population Selection Process.

Population Selection

This check box is selected by default when you select *Population Selection* in the Selection Criteria field in the Input Parameters group box on this page.

Use the Population Selection option to restrict the selection of IDs to only the IDs identified by a tool configured to select a specific population. Only identified IDs are selected for an SAP evaluation. If they meet the evaluation criteria, an SAP calculation is created.

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If the preview functionality is enabled for the selection tool, you can preview the population selection results before you run the process.

Selection Tool

This field is available if the Population Selection check box is selected. Select from *Equation Engine*, *PS Query*, or *External File*, or enter a tool that your institution created to select the IDs to review for an SAP calculation. Additional parameters are displayed for your selected tool.

Query Name

Select a query to use for Population Selection. This field is available only when *PS Query* is selected in the Selection Tool field. Select a PS Query that uses the SFA_SAP_BIND bind record.

Input Parameters

Aid Year

Select the aid year for which you want to evaluate Satisfactory Academic Progress. This field displays only if you have selected a SAP Process Type of *Aid Year* for the career in context in your SAP setup.

Term

Select the term for which you want to evaluate Satisfactory Academic Progress. This field displays only if you have selected a SAP Process Type of *Term* for the career in context in your SAP setup.

Selection Criteria

Select one of three options to determine which IDs are selected and evaluated for an SAP Calculation.

Select *Population Selection* to use the Population Selection feature to select IDs for an SAP evaluation. When selected, the Population Selection check box is selected, the options in the Population Selection group box are displayed, the Student Override check box is not available, and the Student Override grid is hidden.

Select *Student Override* to manually enter in specific IDs for an SAP evaluation in the Student Override grid. When selected, the Student Override check box is enabled, the Student Override grid is displayed, the Population Selection check box is disabled, and the Population Selection options are hidden.

Select *Standard SAP Selection* to use the built-in SAP selection criteria to select IDs for an SAP evaluation. This option disables the Student Override and Population Selection check boxes and hides both the Student Override grid and the Population Selection options.

Processing Option

Select the processing option:

- *Update and Report* inserts the same row into the Student SAP Record and the Review Report Data page.
- *Report Only* inserts a row into the Review Report Data page. Use this option to see the results before updating the SAP status on the Packaging Status Summary page.
- *Update Only* inserts a row into the Student SAP Record.

Update using most recent evaluation term (Pass 2)

Select this check box to update Pass 2 into the Student SAP record. If this is not selected, Pass 2 results are not updated in the Student SAP record.

Pass 2 processing occurs when the student does not have a row for the term or aid year being processed. Statistics from the latest term or aid year are used to calculate the student's SAP Status. Statuses and Actions rules are not evaluated for Pass 2.

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Skip Status and Actions

Select this check box to skip the Statuses and Actions rules set up when processing Pass 1 for multiple aid years or terms. This avoids an incorrect Calc SAP status from being calculated. If this option is selected on the SAP processing run control *and* Statuses and Actions rules are set up and selected, they are skipped.

Use this option when you are running multiple aid year or term processes and comparing with the prior status would not be accurate. This option obtains the actual calculated SAP status for the student and does not evaluate the prior statuses and any matching statuses and action rules.

As an example, you would not select this option in this case: If processing in January for spring 2006 and for fall 2006, the previous fall 2005 is the maximum term past the fully graded date that both processing terms select. If the process is run for spring 2006 with a status of *Probation*, then runs for fall 2006, it calculates *Probation*, then compares it to the spring value of *Probation*, and gives an overall status of *Disqualified* which would be incorrect.

Don't Run If SAP Status Exists

Select this check box if you do not want to recalculate for students who already have a SAP Status code for either the aid year or term that you are processing.

Update Options

These options appear only when the Don't Run If SAP Status Exists check box is not selected.

Calc SAP Status Change Only (calculate SAP status change only)

Select this option to insert a new SAP record if no SAP record exists for the run control values or if the Calc SAP Status code changes.

Any Calculation Value Change

If this option is selected, the process inserts a new row (create a new SAP calculation) if any of the values change from a previous calculated row for the same term/aid year - even if the resulting changes do not change the Calculated Status. It also inserts a new row if no row exists.

If this option is not selected, then a new row is only inserted if there is a change to the Calculated Status. It also inserts a new row if none exists, unless there is no data to process for that term or aid year.

Student Override

Select the Student Override option to display the Student Override grid for entry of student IDs. Enter the IDs of the students to be considered for SAP evaluation. If the students meet the evaluation criteria, an SAP calculation is created. Only the IDs you list are processed.

Maintaining Student SAP

Access the Student SAP page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Student SAP).

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Student SAP | Career Exceptions | Term Exceptions

ID: FASAP0064 Proper,Sam
Institution: PSUNV PeopleSoft University
Career: UGRD Undergraduate
Term: Calc SAP

Student SAP Find | View All First 1 of 1 Last

Term: 0690 2012 Fall
Packaging Status Summary Not Meet
Program: LAU Liberal Arts Undergraduate
Plan: UNDECL-UG Undeclared Undergraduate
Calc SAP Status: DISQ Not Meeting Standards
Override SAP Status:
Updated:
User ID:
Comments:

SAP Calculation Results

Test	Used	Actual	Rule From	Range To	Failed	Status	Severity	Exception Used	Term
Academic Standing:	Y		N/A	N/A	☐	UK	40	N/A	
Max Attempted Units:	Y	32.000			☐	MEET	10	N	N/A
Max Attempted Terms:	Y	3.000			☐	MEET	10	N	N/A
Min Current GPA:	Y	2.000			☐	MEET	10	N	N/A
Min Cumulative GPA:	Y	1.000	0.010	1.990	☑	PRB1	60	N	N/A
Current Earned Units:	Y	4.000	10.00 %	50.01 %	☑	DISQ	95	N	N/A
Cumulative Earned Units:	Y	8.000	5.00 %	30.00 %	☑	DISQ	95	N	N/A
Two Year GPA:	Y	1.000	0.000	1.999	☑	DISQ	95	N	N/A

SAP Calculation Data

Current Units Attempted: 8.000
Current Earned Units Percent: 50.00 %
Cumulative Units Attempted: 32.000
Cumulative Earned Units Pct: 25.00 %
Two Year Nbr of Terms: 3

Processing Information

Process User Id: PS
Process Date/Time: 07/12/13 10:39:38AM
Processing Message: Statistics Calc Pass 1, Term 0685

Student SAP page

All students with an FA Term built are able to access the SAP Student Data page, which allows for online SAP calculation for an individual student. Students must have an active row in FA Term for the term or aid year that is being processed. If an active row does not exist, the process executes but returns a blank page, or, if a previous status exists, the existing page data is displayed.

Note. Before running the online process, ensure that the Set Up Activation field is set to *Active* on the Setup page (Set Up SACR, Product Related, Financial Aid, Satisfactory Academic Progress, Define Setup Criteria, Setup).

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This page displays the SAP status code and all the calculation results used to determine a student's SAP status code.

The Aid Year or Term field is displayed depending on the setup criteria. Enter the aid year or term to process for the SAP online process.

Click the Calc SAP button to run the SAP process for an individual. An Active FA Term record must exist for the aid year or term being processed. After processing, the SAP Calculation Results, SAP Calculation Data, and Processing Information group boxes are populated.

Student SAP

Aid Year or **Term**	The aid year or term used in the SAP online or batch calculation. If the batch process calculated the data, this is the aid year or term used on the run control for that batch run.
Packaging Status Summary	Click this link to view the Satisfactory Academic Progress field on the Packaging Status Summary page. This page is shown in the next section of this chapter.
Program	Displays the academic program from FA Term that was used to determine SAP status.
Plan	Displays the academic plan from FA Term that was used to determine SAP status.
Calc SAP Status (calculated SAP status)	Displays the calculated SAP status that controls the value in the SAP field on the Packaging Status Summary page. To access this page, click the Packaging Status Summary link.
Override SAP Status	You can enter a SAP status to override the calculated SAP status. If populated, this status overrides the value in the Calc SAP Status field and controls the Satisfactory Academic Progress field on the Packaging Status Summary page. Delete the override status before running the process after the fully graded date.
Updated	Displays the date that an override is placed on the student's SAP record.
User ID	Displays the user ID of the person who applied the override.
Comment	A comment can be placed in this field to provide additional information on a student's SAP. Use the comment field when you override a student's SAP Status.

SAP Calculation Results

Test

The eight tests used to determine an SAP status. The possible tests are:

- Academic Standing
- Max Attempted Units
- Max Attempted Terms
- Min Current GPA
- Min Cumulative GPA
- Current Earned Units
- Cumulative Earned Units

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- Two Year GPA

Used	Indicates whether this test was used to determined SAP status.
Actual	Displays the calculated value for any test that is used. This is the value that is used in the rule comparison.
Rule Range From	Displays the lower end of the failed range of the test if the student failed the test. Academic standing does not use ranges and no value exists for the Academic Standing Test row.
Rule Range To	Displays the upper end of the failed range of the test if the student failed the test. Academic standing does not use ranges and no value exists for the Academic Standing Test row.
Failed	Displays as checked if the student failed the test.
Status	Displays the calculated status for each test.
Severity	Displays the severity of each SAP test. The status of the test with the highest severity is used to populate the Calc SAP Status field.
Exception Used	Indicates whether an exception rule was used to determine SAP status.
Term	Displays the term used to evaluate academic standing from Student Records. Only displays for the Academic Standing test.

SAP Calculation Data

Bundle 30
Added the "Current Earned Units Percent" and "Cumulative Earned Units Pct" display fields.

Current Units Attempted	Displays the number of units the student is attempting for the evaluation term or aid year terms. This is used in the Current Earned Units test.
Cumulative Units Attempted	Displays the cumulative number of units the student attempted, up to and including the units for the term or terms in the aid year being evaluated. This is used in the Cumulative Earned Units test.
Two Year Nbr of Terms (two year number of terms)	Displays the number of attempted terms calculated for use in the Two Year GPA test.
Bundle 30	**Added new field.**
Current Earned Units Percent(	Displays the Current Earned Units Percent field calculated when the "Use Percentage" option is selected for Current Earned Units Test in the SAP Define Set Up Criteria.
Bundle 30	**Added new field.**
Cumulative Earned Units Pct((cumulative earned units percent)	Displays the Cumulative Earned Units Percent field calculated when the "Use Percentage" option is selected for Cumulative Earned Units Test in the SAP Define Set Up Criteria.

Processing Information

Process User ID	Displays the user ID of the person who ran the batch process.
Process Date/Time	Displays the date and time when the process was run.

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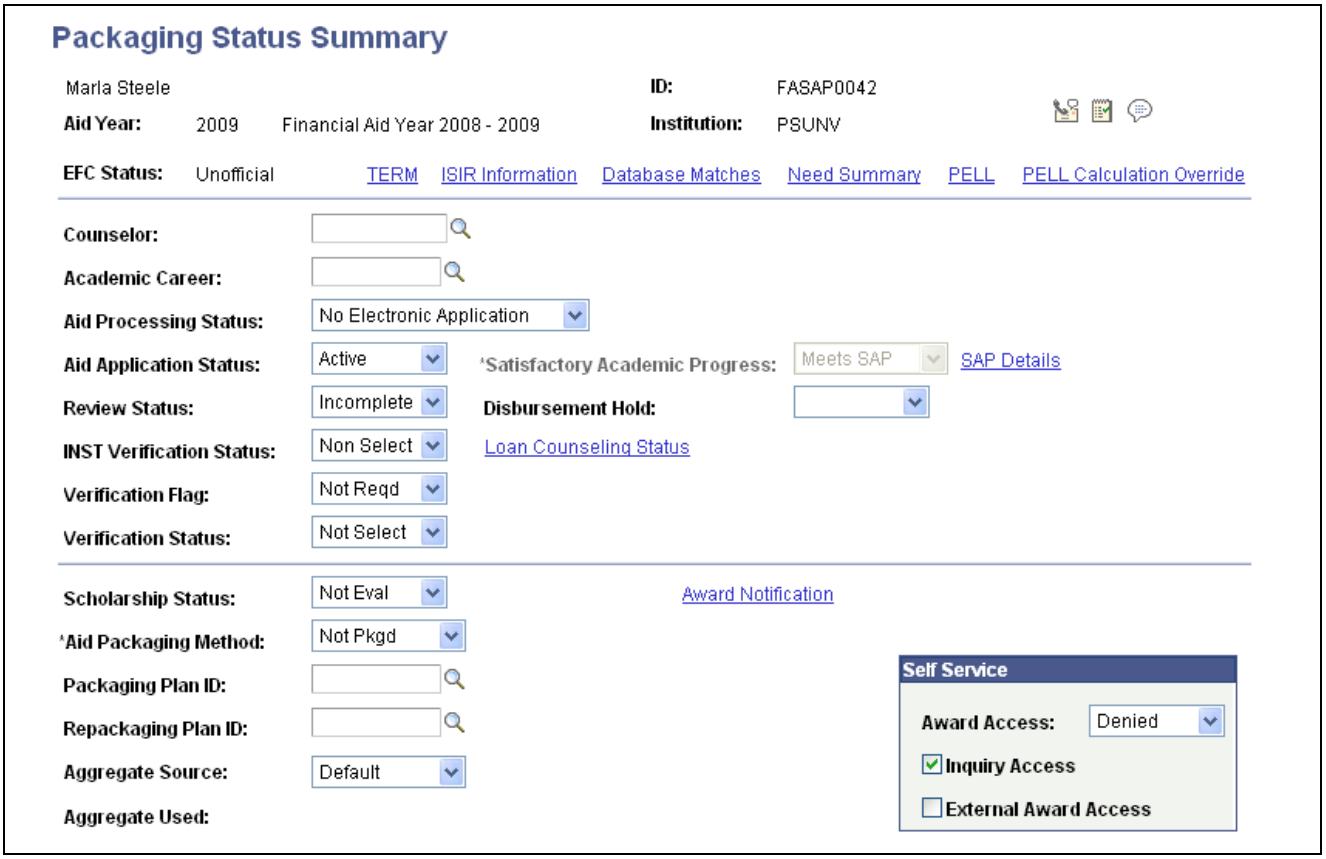
Processing Message: Displays the source of the status code:

- Default SAP Status. The status assigned to students who pass all of the selected tests.
- Statistics Calc Pass 1, Term XXX. Calculated status from the evaluation term or max term in an aid year.
- Statistics Calc Pass 2, Term XXX. Calculated status from the latest (max) term on the student's record.

Viewing the Satisfactory Academic Progress Field

Access the Packaging Status Summary page. (Click the Packaging Status Summary link from the Student SAP page.)



Packaging Status Summary page

Satisfactory Academic Progress Enter the SAP status. If the field is not editable, active SAP setup data exists. When active setup data exists, the Process SAP process updates this value based on the SAP status code setup.

SAP Details Click this link to navigate to the Student SAP page.

Defining Student-Specific Career Exceptions

Access the Career Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Career Exceptions).

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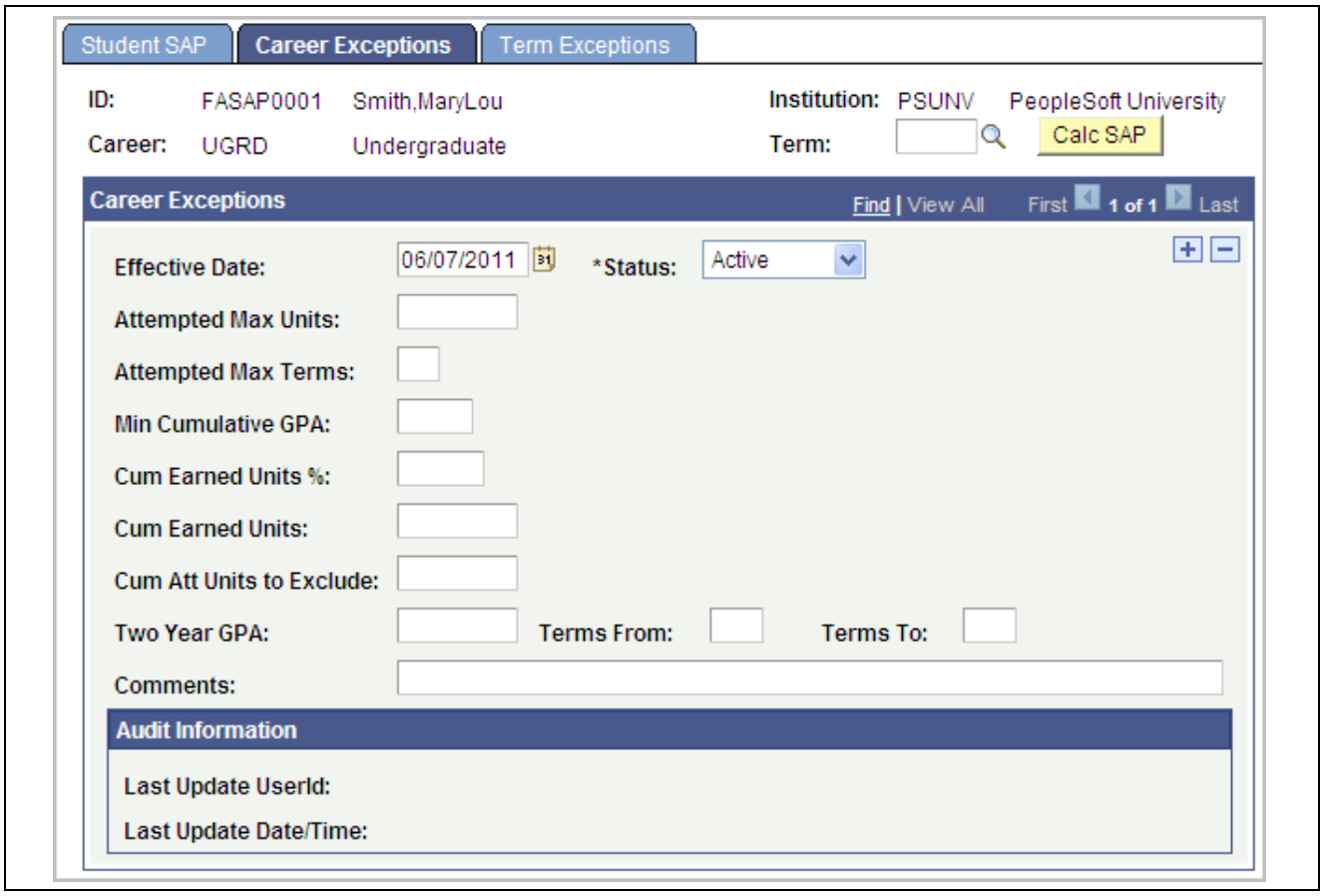

Career Exceptions page

This page is for student-specific career rules, rewriting the rule at the student level for the Effective Date and Status control when the student-specific career rule is applied. If any career rules fail when processing, the Exception Failure Default Status is applied and the exception flag is set to Y for the test using the exception.

The SAP status assigned for any career exception failure is the Exception Fail Default Status. It is recommended that this Severity code is the highest of the Not Meet status codes.

Click the Calc SAP button to run the SAP process for an individual. An Active FA Term record must exist for the aid year or term being processed.

Career Exceptions

Effective Date	Date this rule is applied.
Status	*Active:* Rule is active and in effect. *Inactive:* Rule is inactive and not in effect.
Attempted Max Units (attempted maximum units)	Enter the total number of attempted units to which the student is limited.
Attempted Max Terms (attempted maximum terms)	Enter the this total number of attempted terms to which the student is limited.
Min Cumulative GPA (minimum cumulative GPA)	Enter the minimum cumulative GPA that the student must have.

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Cum Earned Units % (cumulative earned units percentage)	Enter the minimum percentage (attempted units divided by earned units) to which the student is limited.
Cum Earned Units (cumulative earned units)	Enter the minimum number of (attempted units divided by earned units) to which the student is limited.
Cum Att Units to Exclude	Enter the total number of cumulative attempted units to exclude from the calculation.
Two Year GPA	Enter the minimum cumulative GPA that the student must have for his or her second year.
Terms From	Enter the starting number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the starting number, it is included in the range.
Terms To	Enter the ending number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the ending number, it is included in the range.
Comments	Enter remarks up to 254 characters, that apply to the student career exception.

Defining Student-Specific Term Exceptions

Access the Term Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Term Exceptions).

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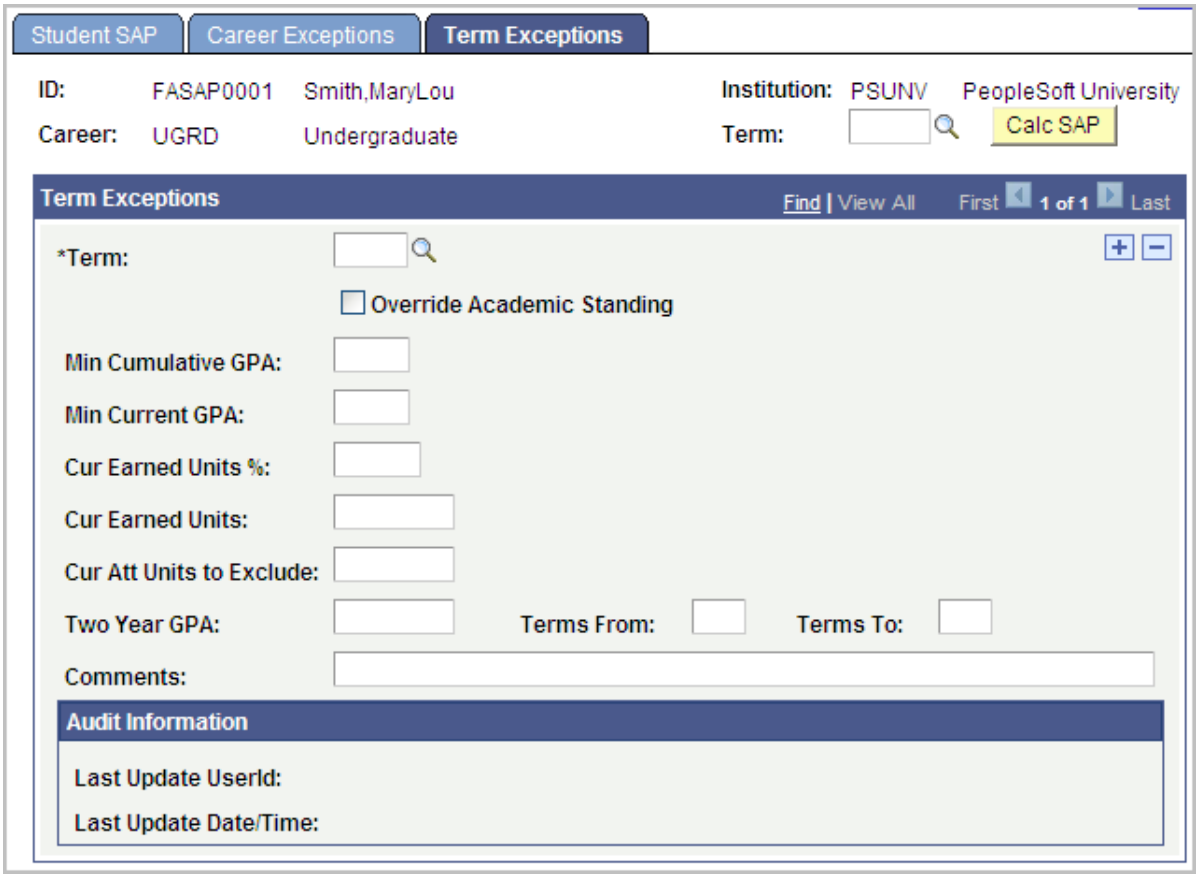

Term Exceptions page

This page appears when the process type set up for this student's institution and career is set to term processing. This page is for student-specific term rules. The rules apply only to the specific term entered.

If any of these rules fail, the Exception Failure Default Status is applied. You should make this Severity code the highest of all the Not Meet status codes.

Click the Calc SAP button to run the SAP process for an individual. An active FA Term record must exist for term being processed.

Term Exceptions

Term	Enter the term to which these specific student rules apply.
Override Academic Standing	Select this check box to override the academic standing rule for students with Warning or Disqualified status.
Min Cumulative GPA (minimum cumulative GPA)	Enter the minimum cumulative GPA that a student must achieve at the end of the term.
Min Current GPA (minimum current GPA)	Enter the minimum current GPA that the student must achieve for the term.
Cur Earned Units % (current earned units percentage)	Enter the minimum percentage (attempted units divided by earned units) for the term that the student must achieve.

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Cur Earned Units (current earned units)	Enter the minimum number of attempted/earned units for the term that the student must achieve.
Cur Att Units to Exclude	Enter the total number of current attempted units to exclude from the calculation.
Two Year GPA	Enter the minimum cumulative GPA that the student must have for his or her second year.
Terms From	Enter the starting number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the starting number, it is included in the range.
Terms To	Enter the ending number for the range of terms for which this career exception to the Two Year GPA rule applies. The numbers are inclusive. If 10 is the ending number, it is included in the range
Comments	Enter remarks up to 254 characters that apply to the student term exception.

Audit Information

Last Update User ID	Displays the user ID of the person who last saved change to this page.
Last Update Date/Time	Displays the date and time when this page was last saved.

Defining Student-Specific Aid Year Exceptions

Access the Aid Year Exceptions page (Financial Aid, Satisfactory Academic Progress, Maintain Student SAP Data, Aid Year Exceptions).

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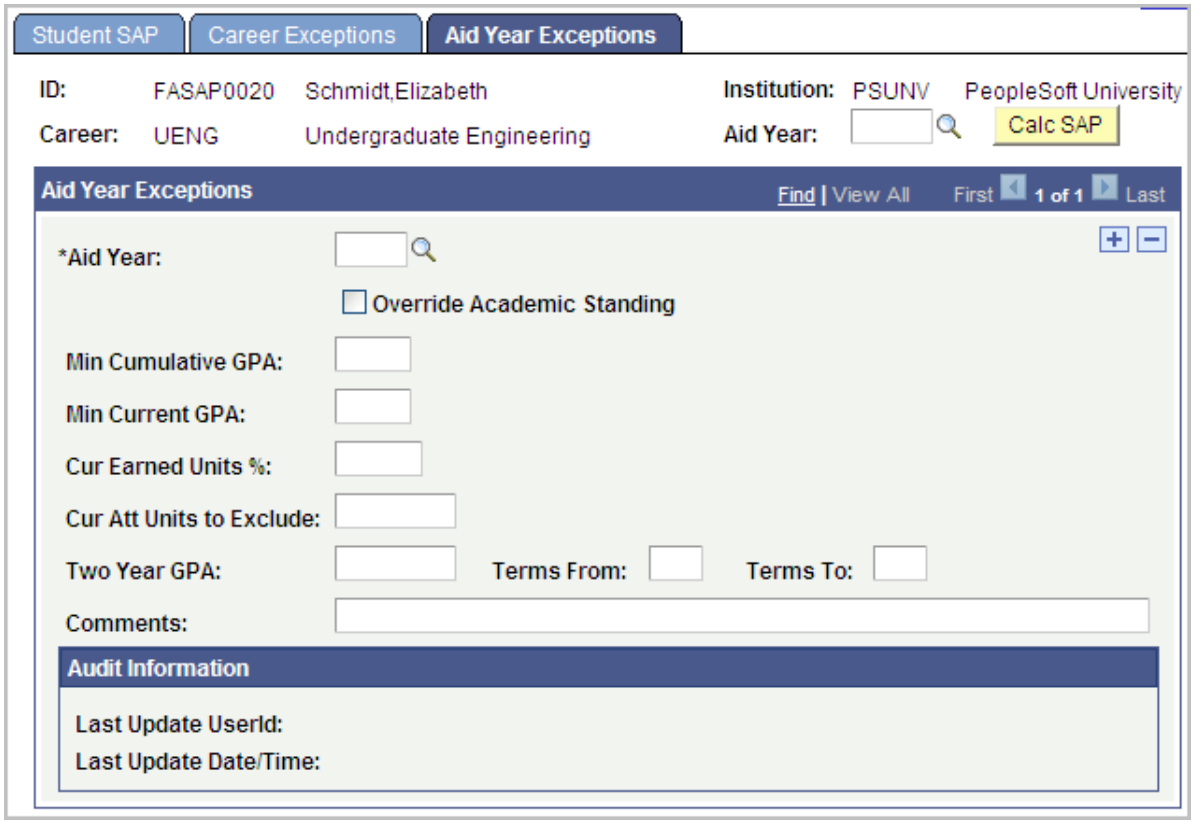

Aid Year Exceptions page

This page appears when the process type set up for this student's institution and career is set to aid year processing. This page is for student-specific aid year rules. The rules apply only to the specific aid year that is entered.

If any of these rules fail, the Exception Failure Default Status is applied. You should make this Severity code the highest of all the Not Meet status codes.

Click the Calc SAP button to run the SAP process for an individual. An active FA Term record must exist within the aid year being processed.

Note. For descriptions of the fields on this page, refer to the documentation about the fields on the Term Exceptions page and replace *term* with *aid year.*

Creating SAP Communications

Access the Create SAP Communications page (Financial Aid, Satisfactory Academic Progress, Create SAP Communications).

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Create SAP Communications page

The SAP Communications process inserts a row into the Event 3C Trigger table. The unmodified (vanilla) Event Process creates the 3C elements as set up in the Event setup record. You can control the production of duplicate communications by using the unmodified (vanilla) event processing controls.

See lscc, Using the 3C Engine, Defining 3C Engine Triggers, Identifying Trigger Conditions.

See lscc, Managing Campus Event Planning, Creating an Event, Naming an Event.

Term or **Aid Year**	Enter the maximum row in the Student SAP record for either term or aid year.
SAP Status Code	Enter the SAP Status Code for which you want to create SAP communications.

Simulating a Student SAP Calculation

Access the Simulate Student Eligibility page (Financial Aid, Satisfactory Academic Progress, Simulate Student Eligibility).

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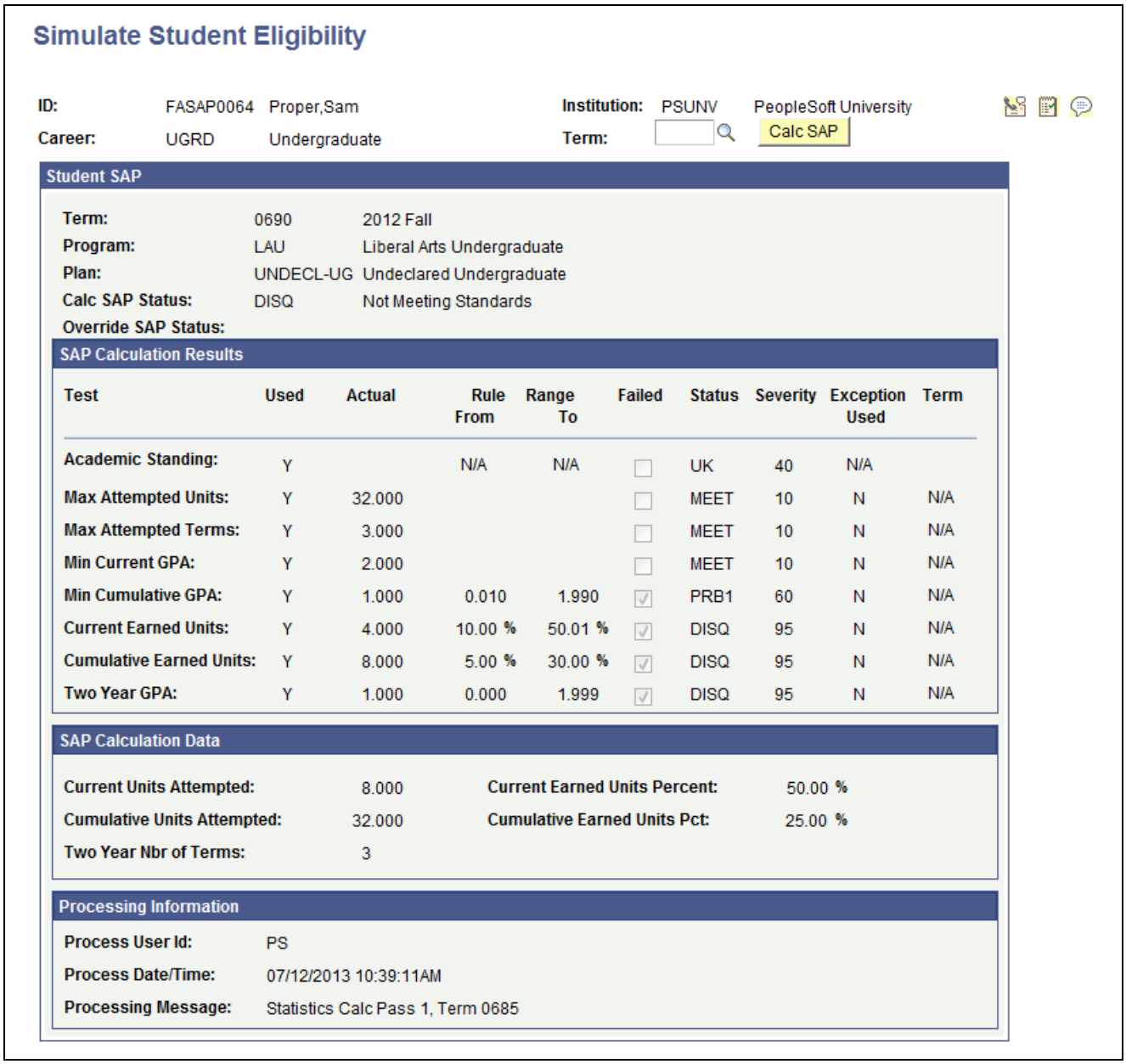

Simulate Student Eligibility

ID: FASAP0064 Proper,Sam
Institution: PSUNV PeopleSoft University
Career: UGRD Undergraduate
Term:
Calc SAP

Student SAP

Term: 0690 2012 Fall
Program: LAU Liberal Arts Undergraduate
Plan: UNDECL-UG Undeclared Undergraduate
Calc SAP Status: DISQ Not Meeting Standards
Override SAP Status:

SAP Calculation Results

Test	Used	Actual	Rule From	Range To	Failed	Status	Severity	Exception Used	Term
Academic Standing:	Y		N/A	N/A	☐	UK	40	N/A	
Max Attempted Units:	Y	32.000			☐	MEET	10	N	N/A
Max Attempted Terms:	Y	3.000			☐	MEET	10	N	N/A
Min Current GPA:	Y	2.000			☐	MEET	10	N	N/A
Min Cumulative GPA:	Y	1.000	0.010	1.990	☑	PRB1	60	N	N/A
Current Earned Units:	Y	4.000	10.00 %	50.01 %	☑	DISQ	95	N	N/A
Cumulative Earned Units:	Y	8.000	5.00 %	30.00 %	☑	DISQ	95	N	N/A
Two Year GPA:	Y	1.000	0.000	1.999	☑	DISQ	95	N	N/A

SAP Calculation Data

Current Units Attempted: 8.000
Current Earned Units Percent: 50.00 %
Cumulative Units Attempted: 32.000
Cumulative Earned Units Pct: 25.00 %
Two Year Nbr of Terms: 3

Processing Information

Process User Id: PS
Process Date/Time: 07/12/2013 10:39:11AM
Processing Message: Statistics Calc Pass 1, Term 0685

Simulate Student Eligibility page

To run the SAP process for a single student without updating the SAP Student Data page, use this page to process SAP status online.

Depending on your setup criteria, either the Term or Aid Year field appears. Enter the aid year or term to process for the SAP online process.

Click the Calc SAP button to run the SAP simulation process for an individual. An Active FA Term record must exist for the aid year or term being processed. After processing, the SAP Calculation Results, SAP Calculation Data, and Processing Information group boxes are populated.

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Student SAP

Aid Year or **Term**	The aid year or term used in the batch or online SAP calculation. If the batch process calculated the data, this is the aid year or term used on the run control for that batch run.
Program	The academic program from FA Term that was used to determine SAP status.
Plan	The academic plan from FA Term that was used to determine SAP status.
Calc SAP Status (calculated SAP status)	The calculated SAP status that controls the value in the Satisfactory Academic Progress field on the Packaging Summary Status page.
Override SAP Status	If populated, this status overrides the value in the Calc Sap Status field and controls the Satisfactory Academic Progress field on the Packaging Summary Status page. Delete the override status before running the process after the fully graded date.

SAP Calculation Results

Test	Eight tests are used to determine an SAP status. The possible criteria are: • Academic Standing • Max Attempted Units • Max Attempted Terms • Min Current GPA • Min Cumulative GPA • Current Earned Units • Cumulative Earned Units • Two Year GPA
Used	Indicates whether this test was used to determine SAP status.
Actual	The calculated value is populated for any test that is used. This is the value that is used in the rule comparison.
Rule Range From	If the student failed this test, the rule displays in the lower end of the failed range. Academic Standing does not use ranges and no value exists for the Academic Standing Test row.
Rule Range To	If the student failed this test, the rule displays in the upper end of the failed range. Academic Standing does not use ranges and no value exists for the Academic Standing Test row.
Status	Displays the calculated status for each test.
Severity	Displays the severity of the SAP status. The status with the highest severity is used to populate the Calc SAP Status field.
Term	Displays the term used to evaluate Academic Standing from Student Records. This field appears for the Academic Standing test only.

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SAP Calculation Data

Bundle 30

Added the "Current Earned Units Percent" and "Cumulative Earned Units Pct" display fields.

Current Units Attempted	Displays the number of units that the student is attempting for the evaluation term/aid year terms. This is used in the Current Earned Units test.
Cumulative Units Attempted	Displays the cumulative number of units that the student attempted up to and including the units for the term or terms in the aid year being evaluated. This is used in the Cumulative Earned Units test.
Two Year Nbr of Terms (two year number of terms)	Displays the number of attempted terms calculated for use in the Two Year GPA test.
Bundle 30	**Added new field.**
Current Earned Units Percent(	Displays the Current Earned Units Percent field calculated when the "Use Percentage" option is selected for Current Earned Units Test in the SAP Define Set Up Criteria.
Bundle 30	**Added new field.**
Cumulative Earned Units Pct((cumulative earned units percent)	Displays the Cumulative Earned Units Percent field calculated when the "Use Percentage" option is selected for Cumulative Earned Units Test in the SAP Define Set Up Criteria.

Processing Information

Processing Message

The message identifies the source of the status code:

- Default SAP Status. The status assigned to students who pass all of the selected tests.
- Statistics Calc Pass 1, Term XXX. Calculated status from the evaluation term or max term in an aid year.
- Statistics Calc Pass 2, Term XXX. Calculated status from the latest (max) term on the student's record.

Reviewing Students from a Batch Run

After running the SAP process in batch, you can use the Review Report Data page to review the results for all eight tests for all students processed in the batch. This page is available when you select either the *Update and Report* or the *Report Only* option on the Process SAP page.

Access the Review Report Data page (Financial Aid, Satisfactory Academic Progress, Review Report Data).

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Review Report Data

Run Control ID: PS **User:** PS

Institution: PSUNV

Career: UGRD

Term: 0550

Run Date and Time: 07/22/08 1:46:09PM

Customize | Find | View 100 | First 1-50 of 512 Last

Student Data | Acad Standing | Max Units | Max Terms | Min Current GPA

	ID	Institution	Career	Term	Program	Plan	Calc SAP Status	Override SAP Status
1	FA0605	PSUNV	UGRD	0550	LAU	UNDECL-UG	UK	
2	FA0607	PSUNV	UGRD	0550	LAU	UNDECL-UG	ZERO	
3	FA0608	PSUNV	UGRD	0550	LAU	UNDECL-UG	UK	
4	FA0609	PSUNV	UGRD	0550	LAU	UNDECL-UG	UK	
5	FA0610	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
6	FA0611	PSUNV	UGRD	0550	LAU	UNDECL-UG	ZERO	
7	FA0612	PSUNV	UGRD	0550	LAU	UNDECL-UG	UK	
8	FA0613	PSUNV	UGRD	0550	LAU	UNDECL-UG	UK	
9	FA0615	PSUNV	UGRD	0550	FAU	UNDECL-UG	UK	
10	FA0616	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
11	FA0618	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
12	FA0622	PSUNV	UGRD	0550	FAU	UNDECL-UG	DISQ	
13	FA0624	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
14	FA0625	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
15	FA0626	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
16	FA0628	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
17	FA0632	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
18	FA0633	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
19	FA0634	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
20	FA0635	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
21	FA0636	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
22	FA0637	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
23	FA0638	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	
24	FA0640	PSUNV	UGRD	0550	LAU	UNDECL-UG	DISQ	

Review Report Data

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