CHAPTER 1

Setting Up Financial Aid Self-Service

This chapter provides an overview of PeopleSoft Campus Self– Service for financial aid and discusses how to:

- Set up self-service inquiry options.
- Set up reporting of external awards.
- Set up self-service awarding options.
- Set up FE FAN view and print options.
- Set up lender selection.
- Set up loan counseling.
- Set up Satisfactory Academic Progress options.
- Set up self-service actions and access in packaging.
- Modify self-service loan status descriptions.
- Create user-defined text.

Understanding Campus Self Service for Financial Aid

Financial Aid self service enables students to view financial aid information and take necessary action. Students can report awards they earned from sources external to the financial aid office. They can accept, decline, and reduce award amounts and then print the Financial Award Notification (FAN). After accepting an award, a student can select a lender to secure the loan and then fulfill loan counseling requirements. Students can also request a change to their financial aid, cancel their aid, or request a meeting through the Request Counselor Action feature.

Students can view a summary of and detailed information about their financial aid for a specific aid year, which includes:

- Estimated financial aid budget, expected family contribution, estimated need, total aid, and remaining need.
- Type of award and the offered and accepted amount for each term within the aid year.
- Loan application status, loan amount, loan fee, net amount, scheduled disbursement data, and lender information.

Setting Up Self-Service Inquiry Options

To set up self-service options, use the Self Service Options component (SS_FA_INSTALL).

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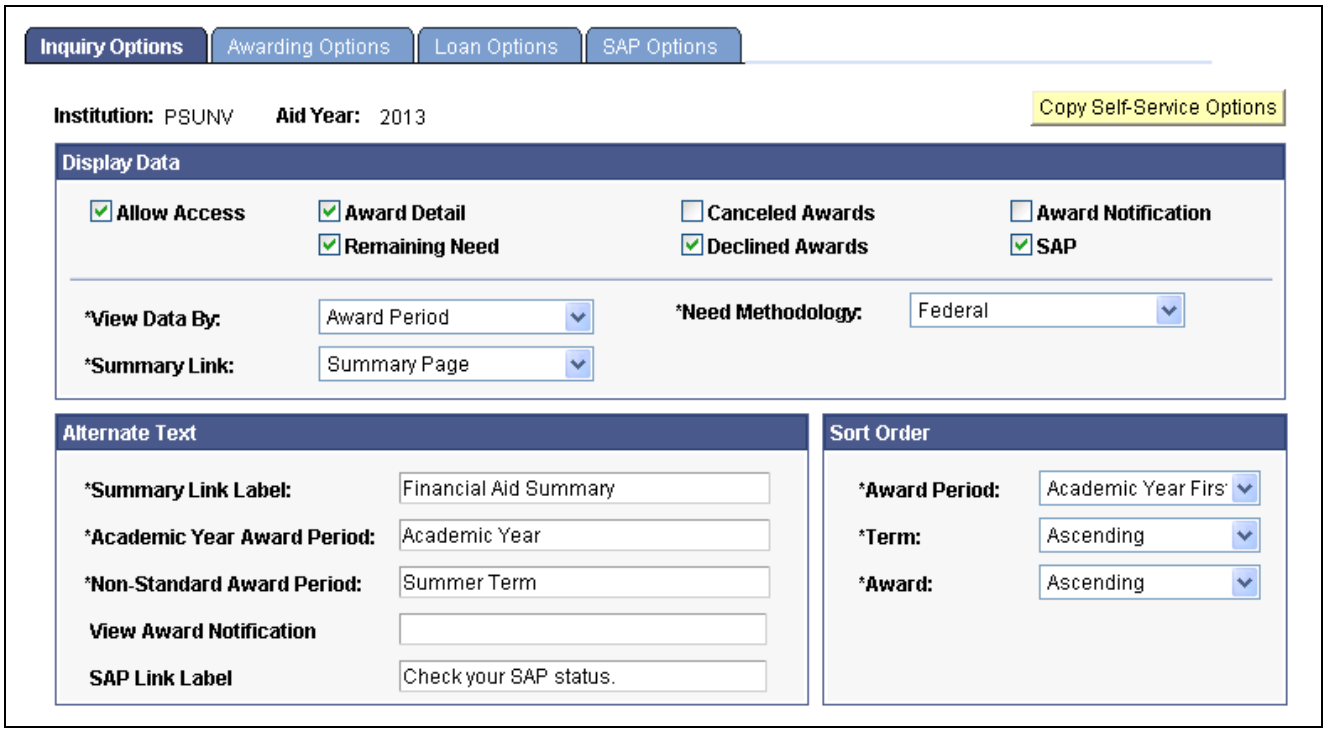
This section discusses how to define self-service options.

Page Used to Set Up Self-Service Inquiry Options

Page Name	Definition Name	Navigation	Usage
Inquiry Options	SS_FA_INSTALL	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Inquiry Options	Define self-service options. Set up information that you want available for students to view.

Defining Self-Service Options

Access the Inquiry Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Inquiry Options).



Inquiry Options page

Use this page to define financial aid elements that students can view online.

Display Data

Allow Access

Select to allow students to view and make decisions about their awards for your institution and aid year in self service. If you clear the check box, students cannot access the self-service inquiry and award package pages for the corresponding year. For example, if the awards are in transition or not ready for viewing, you can clear the check box to prevent all students from viewing their awards.

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Note. Use the Inquiry Access check box and the Award Access field on the Financial Aid Status page to set access at the individual student level. If you clear the Inquiry Access check box, the student cannot access the inquiry pages. However, if you select the Inquiry Access check box and also select the Allow Access check box on the Self Service Options page, the student can access the inquiry pages. Similarly, if you set the Award Access field to *Allowed* and select the Allow Access check box on the Inquiry Options page, the student can access the self-service award pages. The administrative user can set these fields in batch.

Award Detail	Select to display the Financial Aid Award Summary page. If you clear the check box, the student sees the Financial Aid - Self Service Links page.
Remaining Need	Select to display the student's remaining need on the Financial Aid - Financial Aid Eligibility page.
Canceled Awards	If you select this check box and the student has a canceled award, the system activates the View Canceled Awards link on the Financial Aid - Award Summary page.
Declined Awards	If you select this check box and the student has a declined award, the system activates the View Declined Awards link on the Financial Aid - Award Summary page.
Award Notification	Select to display the FE Award Notification PDF link on the student's Financial Aid -Award Summary page and Financial Aid -Award Package page.
Bundle 30	**Added SAP check box**
SAP(Satisfactory Academic Progress)	Select to display a Satisfactory Academic Progress link on the Financial Aid – Award Summary pages.
View Data By	Select from: *Aid Year:* Displays the entire aid year across award periods. *Award Period:* Displays aid year information by the award period for academic and nonstandard periods.
Summary Link	Provides access to view estimated financial aid budget, expected family contribution, estimated need, total aid, remaining need, or user-defined text. Select from: *COA Detail Only:* Displays estimated financial aid budget detail. *Do Not Show Link:* Does not display link. *Summary Page:* Displays the Financial Aid - Financial Aid Eligibility page. Students can view estimated financial aid budget, expected family contribution, estimated need, total aid, remaining need, and user-defined text. *User-defined Page:* Displays user-defined text.
Need Methodology	Select from: *Federal:* Displays estimated financial aid budget and expected family contribution (EFC) values based on federal methodology.

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Institutional: Displays estimated financial aid budget and EFC values based on institutional methodology.

Alternate Text

Summary Link Label

Enter a name for this link. The text that you enter here is the name of the link that appears on the Financial Aid - Award Summary page and the title of the Financial Aid - Aid Year Summary page.

Academic Year Award Period

Enter text such as *Academic Year 2005.* The system displays this text when referring to this specific award period on self-service pages such as the Financial Aid - Award Summary and Financial Aid - Expected Family Contribution pages.

Non-Standard Award Period

Enter text such as *Summer.* The system displays this text when referring to this specific award period on self-service pages such as the Financial Aid - Expected Family Contribution page.

View Award Notification

Enter a name for the link on the Financial Aid - Award Summary and Financial Aid - Award Package pages. This link enables students to view and print their award letter and notification.

Bundle 30

Added SAP Link Label field.

SAP Link Label(Satisfactory Academic Progress)

Enter text for the Satisfactory Academic Progress link on the Financial Aid – Student Awards pages. If no text is entered here, the text that is displayed is *Satisfactory Academic Progress*.

Sort Order

Award Period

Note. The system displays this field only if you set the View Data By field to *Award Period.*

Select from:

Academic Year First: Displays academic year data first and then nonstandard period data.

Earliest Period First: Displays the award period into which the student's earliest term falls. For example, if a student has awards for both Summer 2004 (nonstandard) and Fall 2004 (academic year), and these terms are part of the same aid year, then the nonstandard period is displayed first.

Latest Period First: Displays the award period into which the student's most recent term falls. For example, if a student has awards for both Summer 2004 (nonstandard period) and Fall 2004 (academic year), and these terms are part of the same aid year, then the academic year period is displayed first.

Non-standard Period First: Displays the nonstandard period first.

Note. If the student has awards in only one award period, the system displays whichever award period contains awards. If the student has awards in both periods, the system uses the Award Period sorting option to determine which period to display first.

Term

Select from:

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Ascending: Sorts from lowest term ID to highest and therefore displays the most recent term last.

Descending: Sorts from highest term ID to lowest and therefore displays the most recent term first.

Award The system sorts awards by item type. Select from the following financial-aid item type sequence:

Ascending: 9..100 first, 9..322 last.

Descending: 9..322 first, 9..100 last.

Copy Self Service Options Click to copy financial aid self-service options from this institution and aid year to another.

Setting Up Reporting of External Awards

This section discusses how to:

- Display external award reporting on self-service pages.
- Enable student access to reporting of external awards.

Pages Used to Set Up Reporting of External Awards

Page Name	Definition Name	Navigation	Usage
Awarding Options	SS_FA_INSTALL2	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options	Enable student access from the Award Inquiry page or the Accept/Decline pages. Optionally add instructional text for reporting or viewing.
Packaging Status Summary	STDNT_AID_PACKAGE	Financial Aid, View Packaging Status Summary, Packaging Status Summary	Set access to External Award reporting on student self-service pages.

Displaying External Award Reporting on Self-Service Pages

Access the Awarding Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options).

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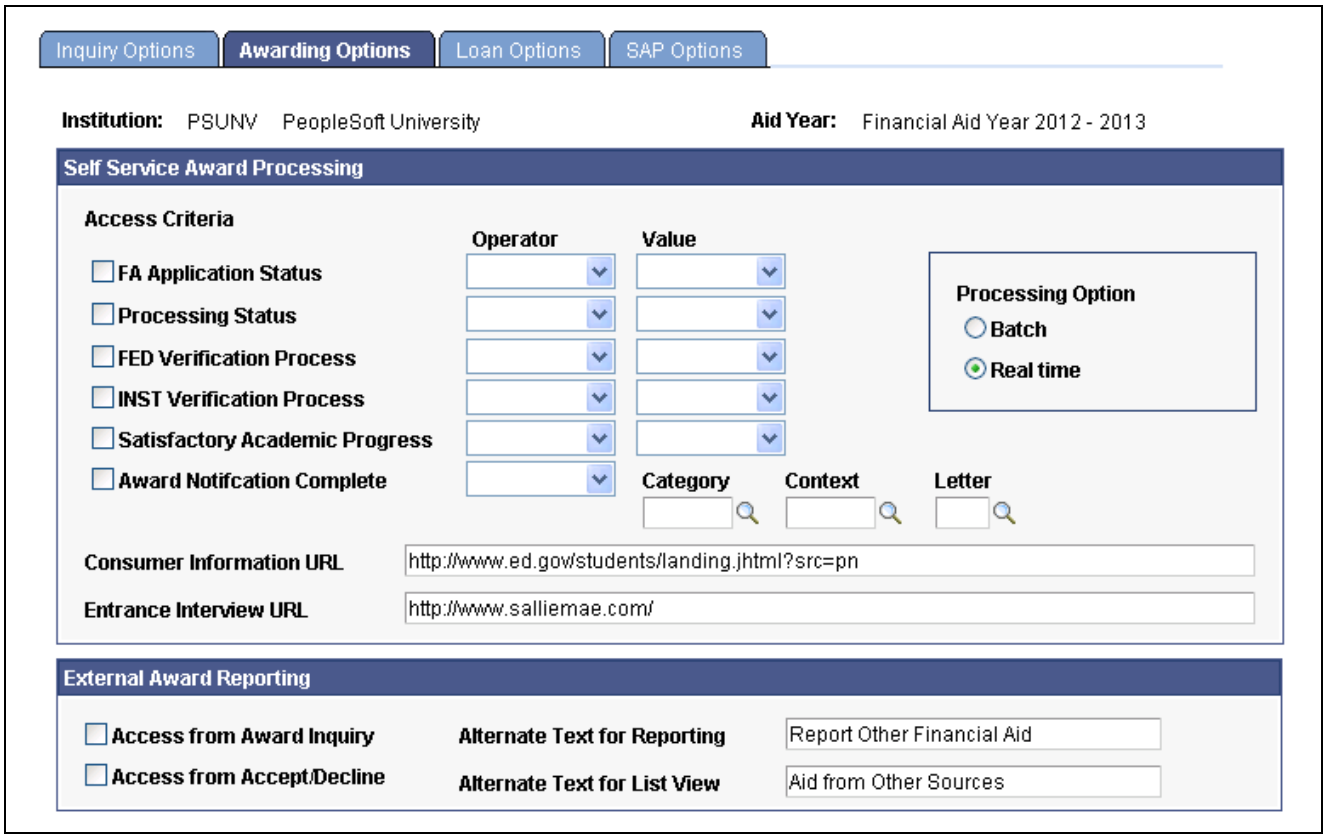

Awarding Options for External Award Reporting page

External Award Reporting

Access from Award Inquiry	Select to display a link to the Report Aid from Other Source component on the students' Award Inquiry Self Service pages.
Access from Accept/Decline	Select to display a link to the Report Aid from Other Source component on the students' Accept Award and Decline Award Self Service pages.
Alternate Text for Reporting	Enter text to use as the link from the Award Inquiry and Accept/Decline page.
Alternate Text for List View	Enter text to use as the page title for a student to report aid from an external source.

Enabling Student Access to Reporting of External Awards

Access the Packaging Status Summary page (Financial Aid, View Packaging Status Summary, Packaging Status Summary).

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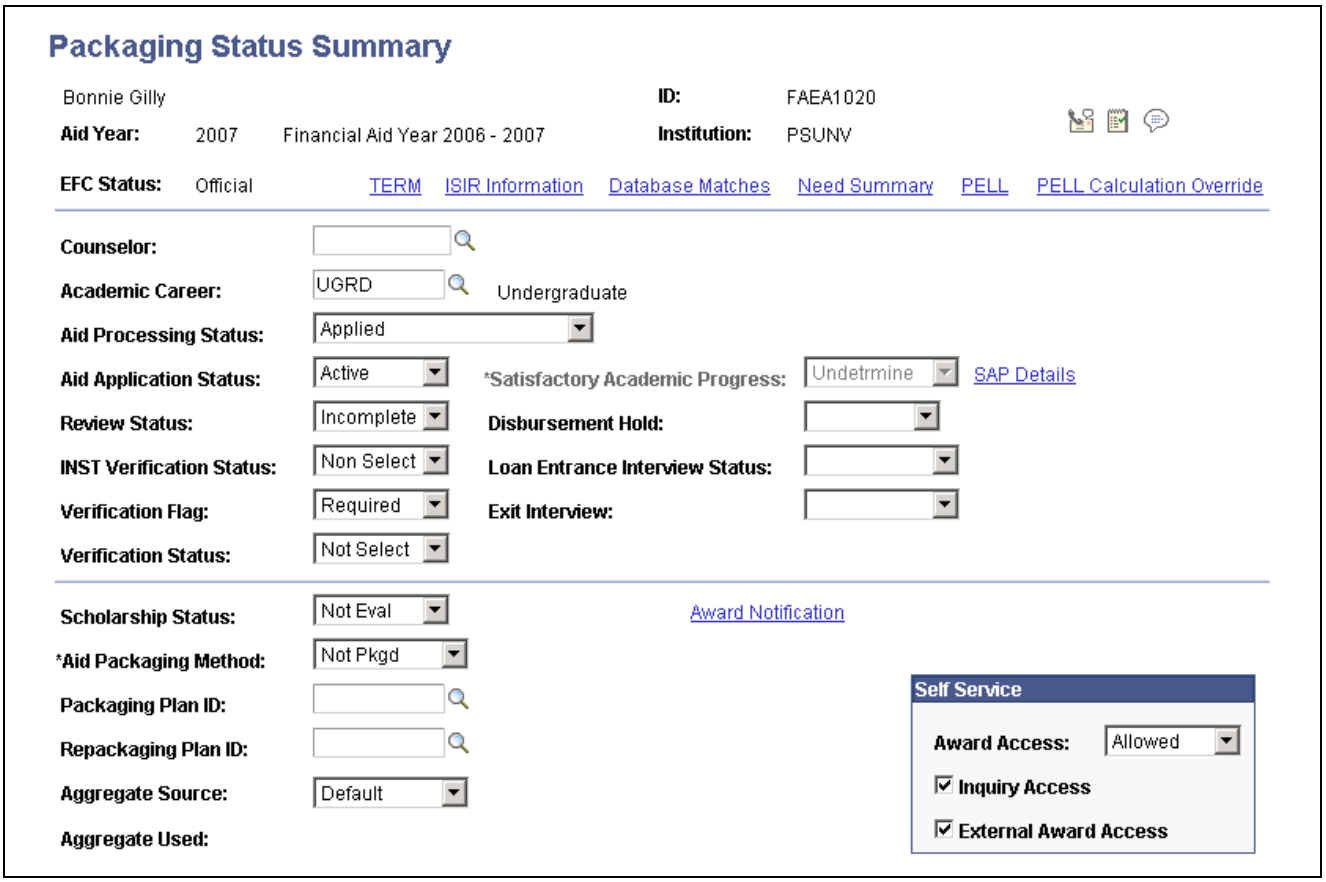

Packaging Status Summary page

For each student, set the access to External Award reporting.

Self Service

Award Access	Select from *Allowed*, *Denied*, and *Use Filter*.
Inquiry Access	Select to enable student access to award information.
External Award Access	Select to enable student access to the External Award reporting component.

Setting Up Self-Service Awarding Options

To set up self-service awarding options, use the Self Service Options component (SS_FA_INSTALL).

This section discusses how to set up self-service awarding.

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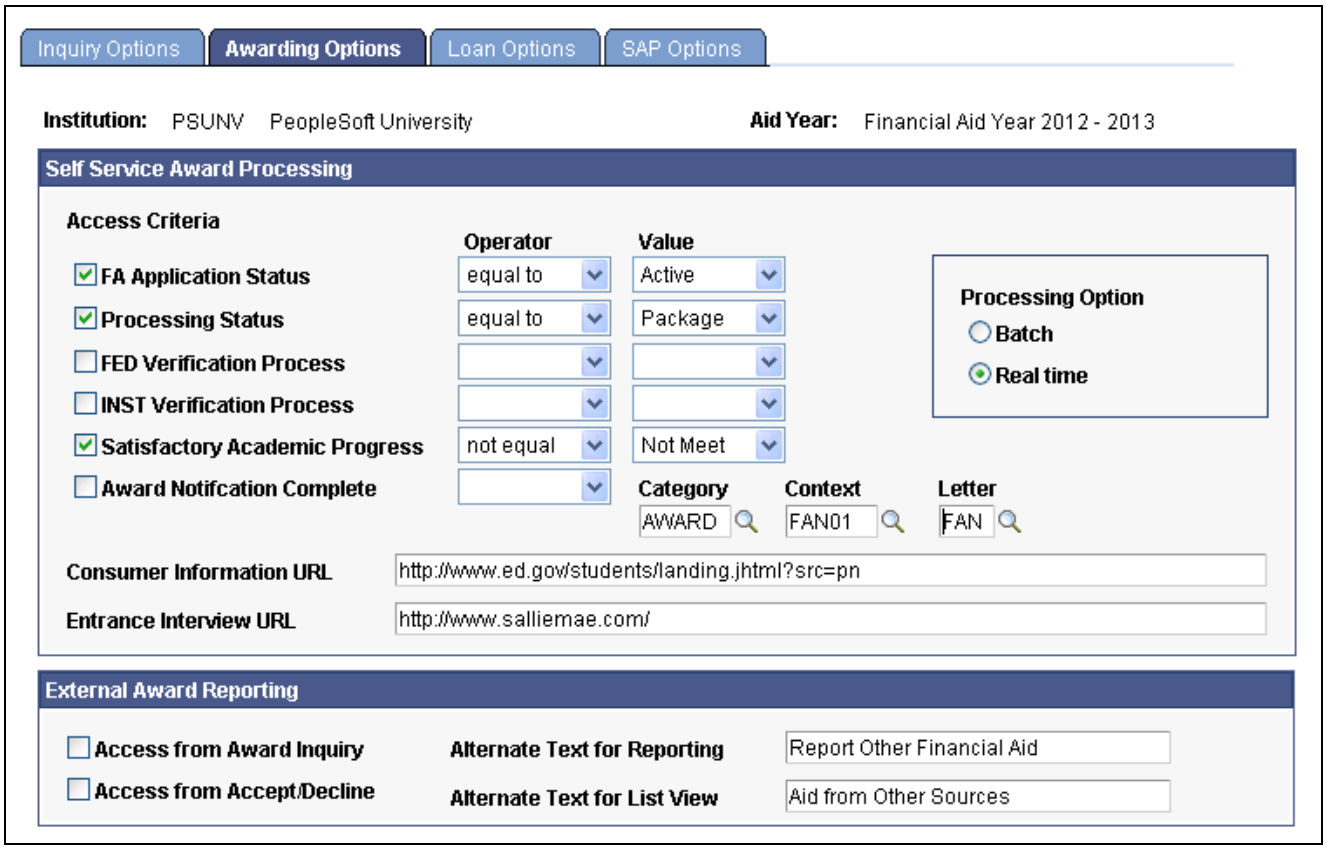
Page Used to Set Up Self-Service Awarding Options

Page Name	Definition Name	Navigation	Usage
Awarding Options	SS_FA_INSTALL2	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options	Define filter options for self-service awarding access criteria. Set up processing options and Consumer and Entrance Interview URLs. Also, define the authentication method and number of required references for the Perkins eMPN.

Setting Up Self-Service Awarding Options

This section discusses how to define access criteria, the different processing options, and the site-definable URLs for self-service awarding.

Access the Awarding Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options).



Awarding Options page

Self Service Award Processing

One way to control when a student gains access to the self-service awarding page is through the use of filtering. If you do not select the check box, then the system does not consider it as part of the access criteria.

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Access Criteria

When setting a value for an access criteria, select an operator of either *equal to* or *not equal*.

FA Application Status (Financial Aid application status)	Select to allow self-service awarding access based on the student having an active financial aid application.
Value	Select *Active, Canceled,* or *Restricted.*
Processing Status	Select to allow self-service awarding access based on the student's processing status.
Value	Select *Applied, Completed, No App Rcd,Package,* or *Review.*
FED Verification Process (federal verification process)	Select to allow self-service awarding access based on the student's federal verification status.
Value	Select *Complete, Not Reqd, Pending,* or *Required.*
INST Verification Process	Select to allow self-service awarding access based on the student's institutional verification status.
Value	Select *Complete* or *Incomplete.*
Satisfactory Academic Progress	Select to allow self-service awarding access based on the student having met your institution's criteria for satisfactory academic progress.
Value	Select *Meets SAP, Not Meet, Probation,* or *Undetrmine.*
Award Notification Complete	Select to allow self-service awarding access based on whether a financial-aid award notification letter has been generated for the student.
Category	Select an option: *Appeal:* FA Appeals *Award:* Financial Aid Award Notification *SAT:* Satisfactory Academic Progress Letters *SCHLRS:* Scholarship Communications *VERF:* Verification Processing
Context	Select a type of communication. The system uses the same criteria when generating the FAN letter.
Letter	Select a type of communication. The system uses the same criteria when generating the FAN letter.

Note. You use these criteria options in conjunction with the *Use Filter* award access option on the Packaging Status Summary page.

Processing Option	This option controls whether students' decisions regarding their awards are processed in real time or in batch. If you select the default value of *Batch,* the system loads the current award package from the real tables to a staging table. It saves the student's activity to the staging table when the student submits an award acknowledgment. The system sets the student's transaction to

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Pending Update and records the current date and time. When you run the batch process, the system selects all transactions with a Pending Update status for processing. For each student selected, as long as the financial aid package has not been revised since the student submitted the award acknowledgment, the system checks each award in the student's package for any changes. It evaluates changed awards to ensure that award amounts and disbursement balances are correct and reductions do not fall below minimum amounts. The system processes all other awards in passive mode. After the batch validation process has finished and if no errors were found, the system posts the data to the student's real award tables in the database.

If you select *Real time*, the system loads the current award package from the real award tables to a staging table. It saves the student's activity to the staging table when the student submits an award acknowledgment. The system evaluates the award activity and the resulting changes as it does in batch mode. The process verifies the Accept or Decline amount, and for award reductions, recalculates the scheduled disbursements. When all of the awards in the student's package are processed and if no errors were found, the system posts the data to the student's real award tables in the database.

Note. Unlike administrative packaging for which the packaging routine performs extensive edits to ensure the validity of an award, in self-service the system processes awards in passive mode and does not perform any federal edits or evaluate the student for eligibility or need criteria. The system performs a subset of edits on any award that is being reduced. Also, the system adjusts an award that has been reduced below minimum amounts established for the system.

Consumer Information URL

If you complete this field, the system displays a link in self-service awarding. If you leave this field blank, the system does not display a link. Enter your institution's student information site. This site may reflect awarding rights and responsibilities such as statement of educational purpose, truth-in-lending content, or other financial aid information.

Entrance Interview URL

Enter your institution's entrance and exit interview site to display a link in self-service awarding. If you leave this blank, the system does not display a link. If you use Self Service Loan Counseling and enter entrance and exit interview URLs on the Loan Counseling page, leave this field blank, or both URLs appear.

External Award Reporting

Access from Award Inquiry

Select to display a link on the students' Award Inquiry Self Service pages.

Access from Accept/Decline

Select to display a link on the students' Accept Award and Decline Award Self Service pages.

Alternate Text for Reporting

Enter instructions to the student that varies from the default text.

Alternate Text for List View

Enter instructions to the student that varies from the default text.

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Setting Up FE FAN View and Print Options

Students can view and print their Forms Engine (FE) financial aid notification letter (FANLTR) in self-service if you display the links on their Award Summary and Award Package pages.

Prerequisites

Before a student can print an FE FAN letter from Self Service, either GhostView or Adobe Distiller must be installed to format the PDF.

Pages Used to Set Up FE FAN View and Print Options

Page Name	Definition Name	Navigation	Usage
FE Award Notification Defaults	FANLTR_DEFAULTS	Financial Aid, Awards, Notification Letter, Award Notification Defaults	Ensure that the Display NID check box is not selected to avoid printing U.S. students' Social Security Numbers on their FAN letters. Select the Print Cancels and Print Declines check boxes to show links to canceled or declined awards.
Inquiry Options	SS_FA_INSTALL	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Inquiry Options	Select the Award Notification check box in the Display Data group box to display the FE Award Notification PDF link on the students' Award Summary and Award Detail pages. Enter a name for the link to the FE Award Notification PDF process in the View Award Notification field in the Alternate Text group box.
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3	Select *Print* from the Print Letter Option drop-down list box.

Setting Up Lender Selection

To set up lender selection for the student, activate the display on the Loan Options page and ensure that the preferred lenders are set up. You might have set up lenders while processing FFELP loans.

This section discusses how to:

- Display lender selection.
- Define self-service lenders.

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See Also

lsfa, Setting Up Common Record CommonLine (CRC), Setting Up Loan Origination for CRC

lsfa, Setting Up CommonLine 4 Loans, Setting Up Loan Participants

Pages Used to Set Up Lender Selection

Page Name	Definition Name	Navigation	Usage
Loan Options	SS_FA_INSTALL3	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Loan Options	Set lender selection to appear on the student self-service page.
Identify Self Service Lenders	SFA_LNDR_SELECT_SU	Set Up SACR, Product Related, Financial Aid, Loans, Identify Self Service Lenders	Select the preferred lender for each loan type.
Create CRC Loan Participants	SFA_CRC_DEST_ID	Set Up SACR, Product Related, Financial Aid, Loans, CR Common Line, Create CRC Loan Participants	Identify the lenders for Common Line loans.
Maintain Lender Codes	LENDER_LOAD_MAINT	Set Up SACR, Product Related, Financial Aid, Loans, Common Line 4, Maintain Lender Codes	Identify the lenders for CL4 loans.

Displaying Lender Selection

Access the Loan Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Loan Options).

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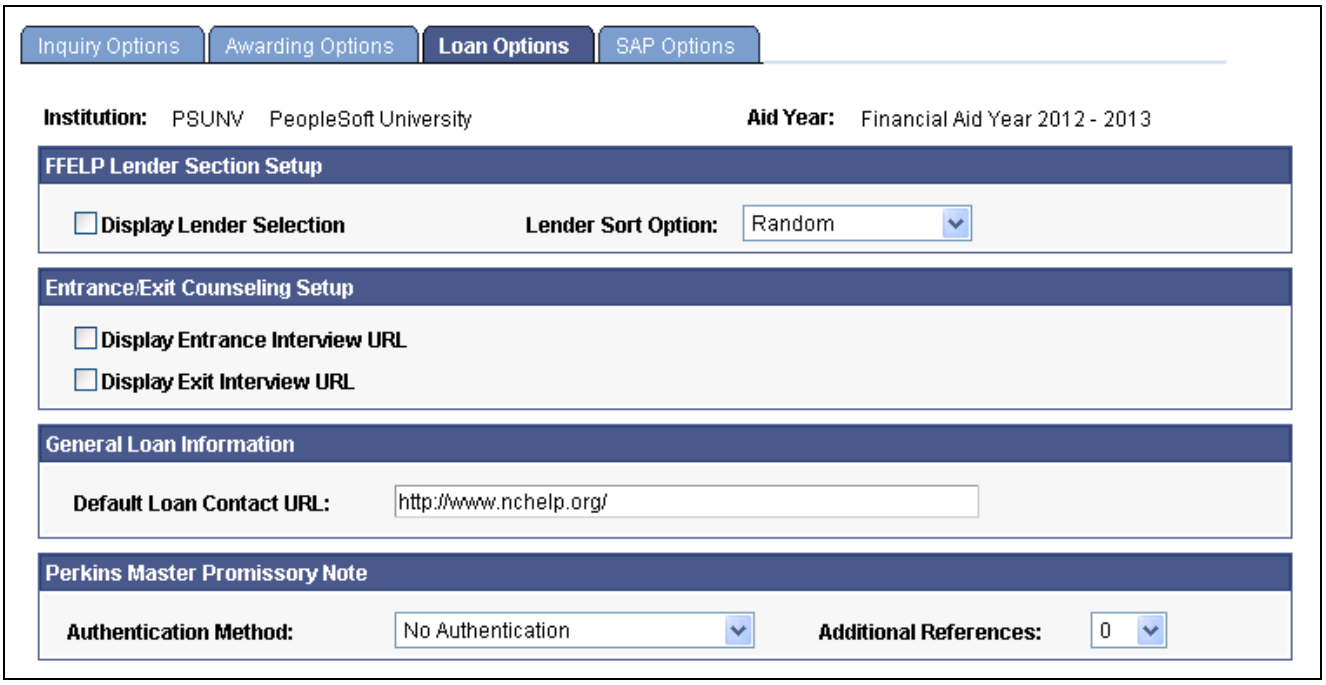

Loan Options for Lender Selection page

FFELP Lender Section Setup

Display Lender Selection Select *x* to display the lender selection on the students' self-service pages.

Lender Sort Option If you selected the Display Lender Selection check box, select *Random* or *Sequence Number* to control how the lender list is displayed in self-service:

Random (default) results in the lenders being displayed in a different random order each time the student accesses the Lender Selection page.

Sequence Number results in lenders being displayed based on the sequence number that was assigned to each lender on the Identify Self-Service Lenders page.

Entrance Exit Counseling Setup

Display Entrance Interview URL To activate an entrance interview link for loan counseling, select this check box. The URL is defined on the Loan Counseling page.

Display Exit Interview URL To activate an exit interview link for loan counseling, select this check box. The URL is defined on the Loan Counseling page.

General Loan Information

Enter a URL to enable students to access more detailed loan information. This URL can link students to an already existing intranet loan page or to an external loan servicer for which you have established a relationship. This link is available only if the loan has been originated in the system. The URL appears on the Financial Aid - Loan Application Information page.

Perkins Master Promissory Note

Use these options to support your eMPN processes and dynamically adjust the Self-Service page components within the eMPN process.

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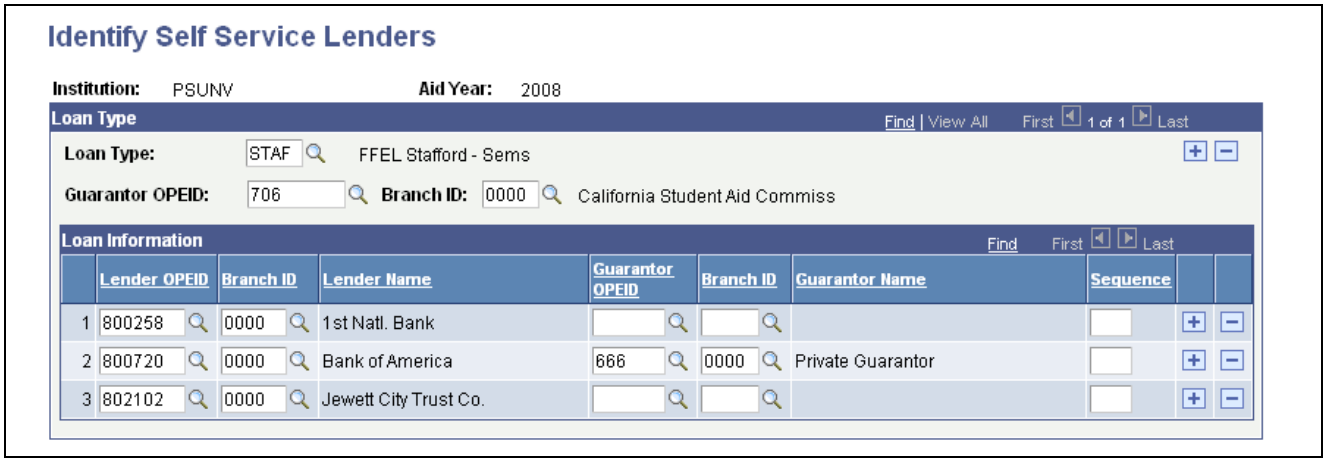
Authentication Method Indicate the verification method for authenticating a student for eMPN. If you select *Birthdate*, *Personal Identification Number*, or *National ID Number*, students must enter the required information to authenticate and continue with the eMPN process. If you select *No Authentication*, the system does not prompt for authentication information.

You define a student's birth date, national ID number, and PIN in Campus Community. The system always uses the student's primary national ID number for authentication purposes.

Additional References Indicate the number of required references (0, 1, 2, or 3) in addition to the required two references collected to complete the eMPN.

Defining Self-Service Lenders

Access the Identify Self Service Lenders page (Set Up SACR, Product Related, Financial Aid, Loans, Identify Self Service Lenders).



Identify Self Service Lenders page

Use this page to set up self-service lender lists and associated guarantors for each loan type. This information appears for the student in Self Service only if the Display Lender Selection option is selected on the Loan Options page and the student has been awarded a loan associated with any loan type set up on this page.

The Guarantor values defined on this page are used in combination with the lender selected by the student to derive the correct loan destination during the Loan Origination process.

You can set up a default guarantor in the Loan Type area, define specific guarantors for each lender in the Loan Information area, or both on this page. When the student selects a lender in Self Service, the system first attempts to use the guarantor value associated with the specific lender in the Loan Information area, and if no value exists, it looks for a guarantor value at the Loan Type level. If a guarantor value is not found, a guarantor is not attached to the student's lender selection record, which can result in no loan destination being found during the Loan Origination process.

To ensure that the Loan Origination program determines the correct CommonLine version and loan destination for each loan, you must set up CommonLine version 4 (CL4) loan destinations, Common Record CommonLine (CRC) loan destinations, or both that match the lender and guarantor combinations on this page.

Note. The Lender OPEID value is the only one seen by the student in Self Service. The Lender Branch ID, Guarantor OPEID, and Guarantor Branch ID values are transparent to the student when selecting a lender.

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Loan Type

Loan Type	Select from the drop-down list box to identify each loan type for which you allow a student to select a lender through Self Service.
Guarantor OPEID (gurantor office of postsecondary education identifier)	Enter a guarantor OPEID as a default value for a specific loan type. The default guarantor value entered here is attached to the student's lender selection record only if the Guarantor OPEID field within the Loan Information area is left blank for the lender selected. The values in the lookup list are from the CRC participant setup.
Branch ID	Required if the Guarantor OPEID field is populated. Enter a branch ID that is associated with the guarantor.

Loan Information

Lender OPEID (lender office of postsecondary education identifier)	Enter the lender OPEID available to the student for this loan type. The values in the lookup list are from the CRC participant setup.
Branch ID	Required if the Lender OPEID field is populated. Enter the branch ID that is associated with the lender.
Guarantor OPEID (gurantor office of postsecondary education identifier)	(Optional) Enter a guarantor at this level to indicate a specific guarantor for the lender. If the student selects the associated lender, the guarantor entered here is attached to the student's lender selection record. The values in the lookup list are from the CRC participant setup. If you do not enter a guarantor here, the system checks for a default guarantor in the Loan Type area.
Branch ID	Required if the Guarantor OPEID field is populated. Enter a branch ID that is associated with the guarantor.
Sequence	If *Sequence Number* is selected in the Lender Sort Option field on the Loan Options page, use this field to display the lenders to the student. to the student. If no sequence numbers are identified, the system orders the list by lender OPEID.

Setting Up Loan Counseling

Loan counseling can be handled by the administrator or in Self Service by the student. When the student completes loan counseling for an award defined as requiring an entrance interview, the loan can be disbursed.

This section discusses how to control the display of loan counseling links in student Self-Service.

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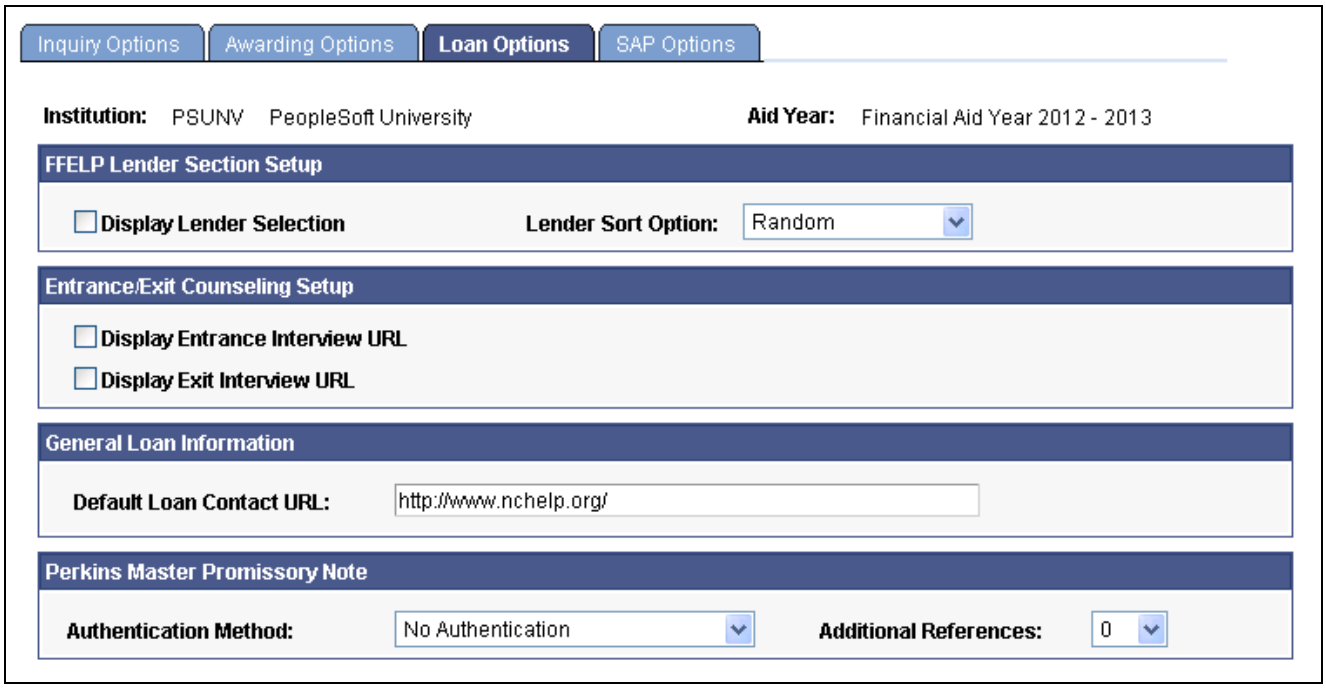
Page Used to Set Up Loan Counseling

Page Name	Definition Name	Navigation	Usage
Loan Options	SS_FA_INSTALL3	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Loan Options	Control the display of entrance interview links and exit interview links on the students' self-service pages.

Controlling the Display of Loan Counseling Links

Access the Loan Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Loan Options).



Loan Options for Loan Counseling page

To activate the display of loan counseling links, select the Display Entrance Interview URL and Display Exit Interview URL check boxes. If you do not want to display a link at certain times of the year, clear the check box.

For more information regarding Loan Counseling Setup:

See [PeopleSoft Enterprise Financial Aid 9.0 PeopleBook - Update 1, Setting Up Loan Counseling].

See [PeopleSoft Enterprise Financial Aid 9.0 PeopleBook - Update 1, Setting Up Disbursement Rules].

See Also

[PeopleSoft Enterprise Financial Aid 9.0 PeopleBook - Update 1, Managing Loan Counseling]

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Setting Up Satisfactory Academic Progress Self-Service Options

Bundle 30
Added SAP Options tab.

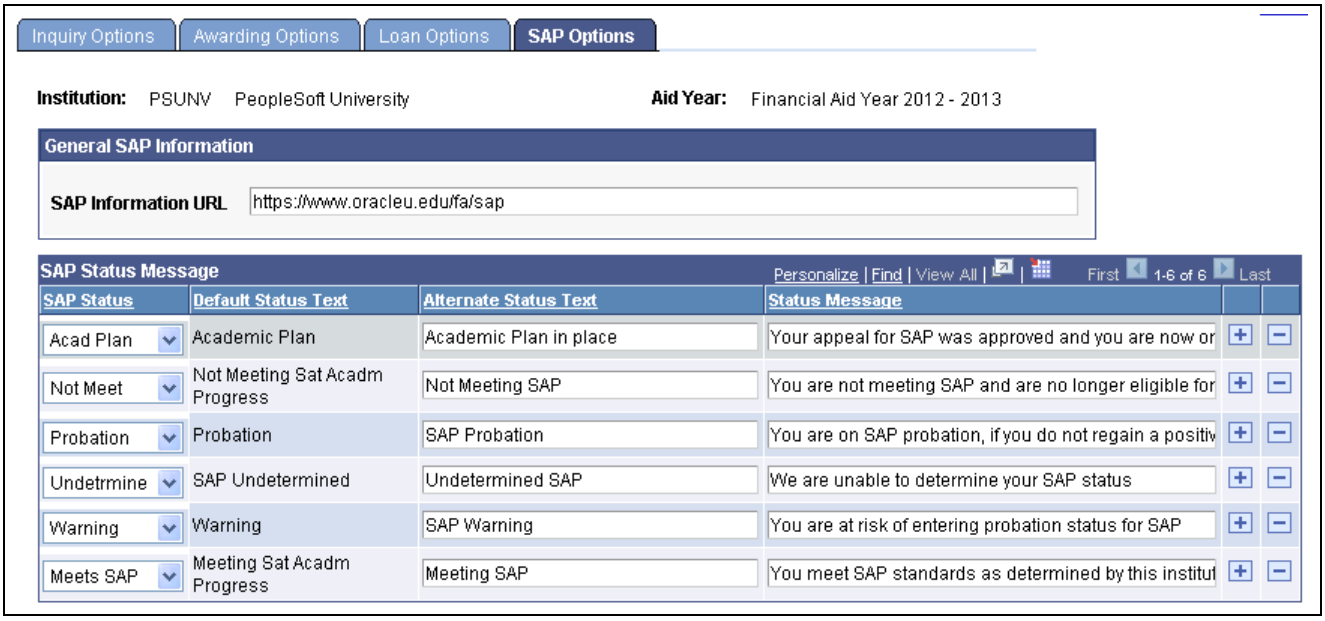
This section discusses identifying an informational URL for Satisfactory Academic Progress and defining custom text for various Satisfactory Academic Progress statuses in Financial Aid Self-Service.

Page Used to Set Up Satisfactory Academic Progress Options

Page Name	Definition Name	Navigation	Usage
SAP Options	SS_FA_INSTALL4	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, SAP Options	Control the display of the SAP informational link and SAP status text.

SAP Options for Self-Service

Access the SAP Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, SAP Options).



SAP Options page

SAP Information URL Enter the URL to display on the SAP Detail page. If populated, this URL is accessible to students when selecting the SAP link from the Self-Service Student Awards page. If left blank, a link does not appear.

Satisfactory Academic Progress Status Messages

In the SAP Status Message group box, set up text to be displayed for each of the system SAP statuses used in the Packaging Status Summary.

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SAP Status Select one of the SAP statuses used in the Packaging Status Summary.

Default Status Text Displays the SAP Status translate value long name. This displays as the SAP Status on the student's SAP Detail page if there is no Alternate Status Text defined.

Alternate Status Text Optionally enter alternate SAP status text to display on the Student SAP Detail page instead of the Default Status Text

Status Message Optionally enter additional text explaining the SAP status.

Setting Up Self-Service Actions and Access in Packaging

To set up self-service actions and access in packaging, use the Financial Aid Item Types component (FINANCIAL_AID_ITEM). Use the component interface (FINANCIAL_AID_ITEM_CI) to load the data into the tables for these component interfaces.

This section discusses how to:

- Define self-service actions in packaging.
- Define self-service access in packaging.
- Change award and inquiry access.

Pages Used to Set Up Self-Service Actions and Access in Packaging

Page Name	Definition Name	Navigation	Usage
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3	Set up disbursement information and self-service action options.
Packaging Status Summary	STDNT_AID_PACKAGE	Financial Aid, View Packaging Status Summary, Packaging Status Summary	Review the student's need, budget, and award or change the student's packaging status. Set the student's self-service inquiry and award access.
Self-service Security	SFA_RUNCTL_SS_SEC	Financial Aid, Awards, Self Service Awarding, Assign Self Service Access, Self Service Security	Set the award and inquiry access value.

Defining Self-Service Actions in Packaging

Access the FA Item Type 3 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3).

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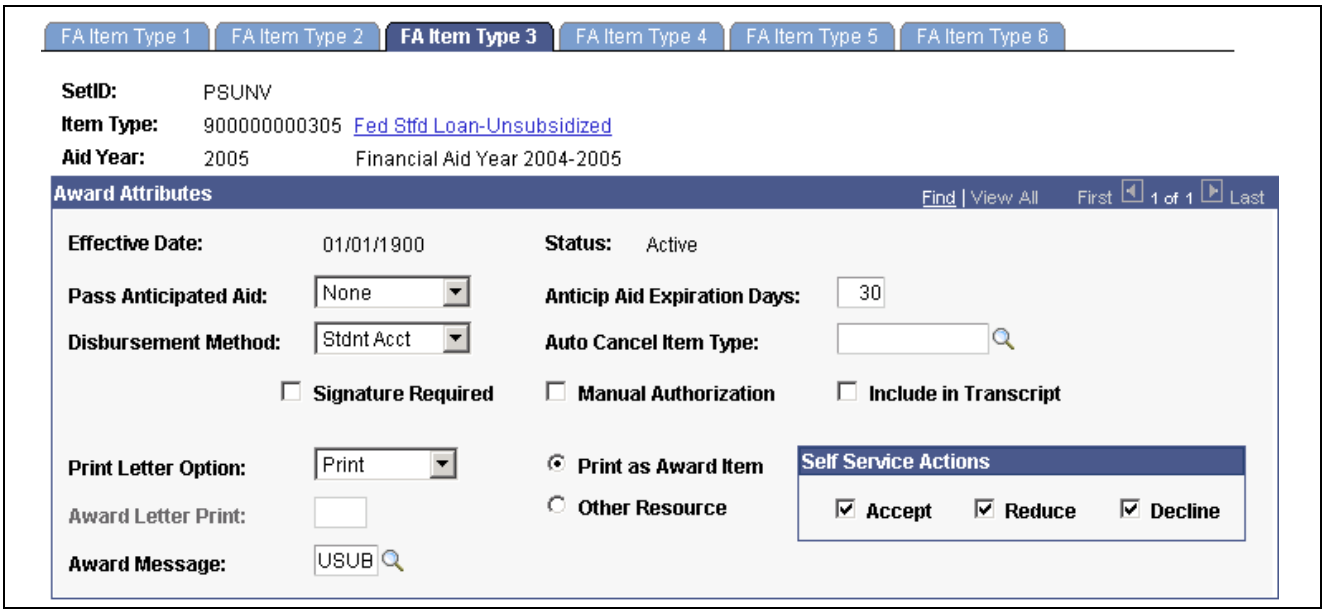

FA Item Type 3 page

The system provides flexibility for controlling whether a student can accept and reduce or decline an award.

The Accept, Decline, and Reduce, options are available only if the Print Letter Option field is set to *Print*.

Self Service Actions

Accept Select to enable the student to accept a particular award. When you select Accept, the Reduce and Decline options become available.

Reduce You must select the Accept option and then the Reduce option to enable the student to reduce a particular award. Clear this option to prevent students from reducing their awards.

You cannot select the Reduce option if the Federal ID value is *ACG* or *SMART* on the FA Item Type 1 page

Decline Select to enable the student to decline a particular award. When a student declines an award, the system sets the Offered and Accept amount fields to 0.00, and the student cannot update the amounts.

Note. If you set the Print Letter Option field to *Never* or blank, the system displays the award on the Financial Aid - Award Summary page (View My Financial Aid), but not on the Award Package page (Accept/Decline Financial Aid).

See Also

lsfa, Setting Up Disbursement Rules, Defining Item Type Disbursement Rules

lsfa, Setting Up Packaging Basics, Defining Financial Aid Item Types, Defining Disbursement and Anticipated Aid

Defining Self-Service Access in Packaging

Access the Packaging Status Summary page (Financial Aid, View Packaging Status Summary, Packaging Status Summary).

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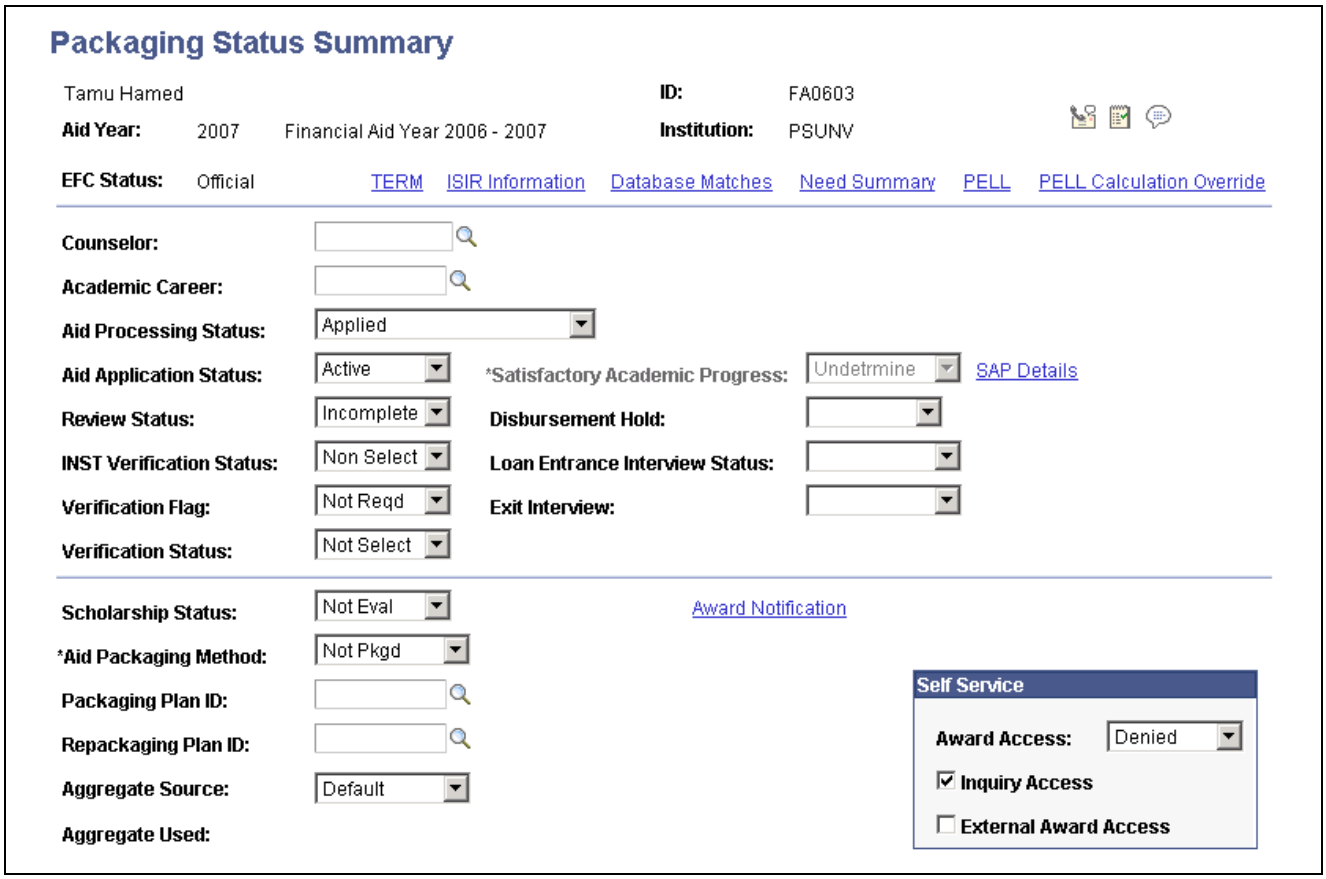

Packaging Status Summary page

Self-Service

You can set these values in a background process by running the Assign Self Service Access process.

Award Access

Select *Allowed* to allow the student access to award acknowledgement for the given year regardless of filtering option criteria established in self-service awarding options setup.

Select *Denied* to deny the student access to award acknowledgment for the given year regardless of filtering option criteria established in self-service awarding options setup.

Select *Use Filter* to require the student to meet the self-service awarding options access criteria to gain access to an award acknowledgment in self-service awarding.

Inquiry Access

Select to allow a student to view assigned financial aid awards.

External Award Access

Select to allow a student access to view reported external awards.

Note. You must also select the Allow Access check box on the Inquiry Options page in setup to enable self-service access.

Changing Award and Inquiry Access

Access the Self-service Security page (Financial Aid, Awards, Self Service Awarding, Assign Self Service Access, Self-service Security).

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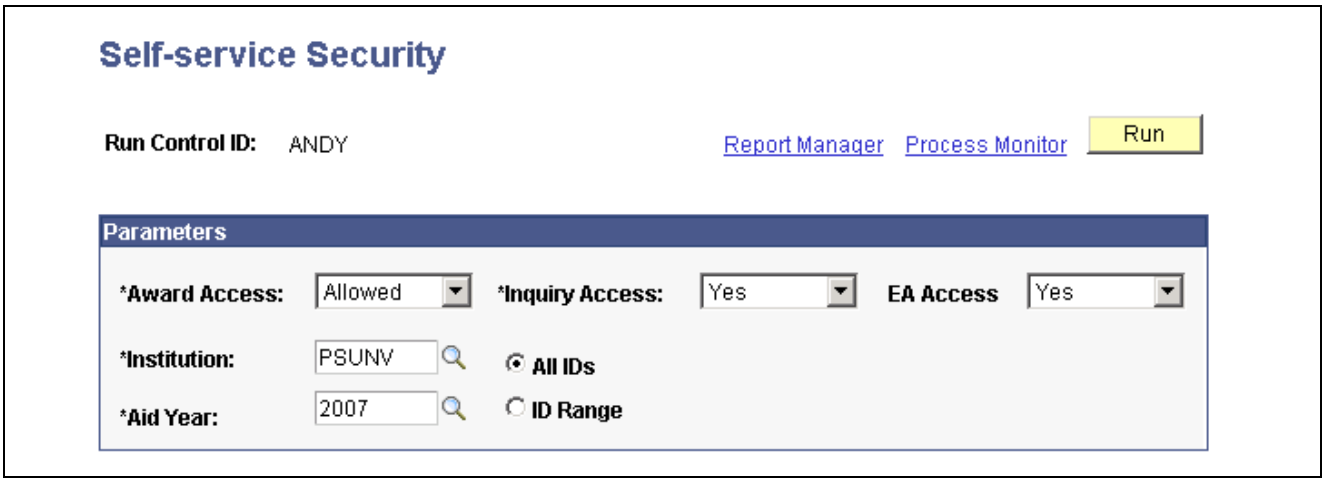

Self-service Security page

Use this page to change the value in the Award Access and Inquiry Access fields on the Packaging Status Summary page. This controls whether a student can access either area of self-service.

Award Access	Select *Allowed*, *Denied*, or *Use Filter*.
Inquiry Access	Select *Yes* or *No*.
EA Access	Select *Yes* or *No*.
Institution	Select your institution.
Aid Year	Select the aid year for which to run this process.
All IDs	Select to update or change all IDs.
ID Range	Select to update or change a range of IDs.

Modifying Self-Service Loan Status Descriptions

To set up self-service loan status descriptions, use the Self Service Loan Status component (SS_FA_LOAN_STAT).

This section discusses how to modify loan status descriptions.

Page Used to Modify Self-Service Loan Status Descriptions

Page Name	Definition Name	Navigation	Usage
Self-Service Loan Status	SS_FA_LOAN_STAT	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self-Service Loan Status	Modify loan status descriptions and comments text that you want a student to see online. This page provides students with their loan application status. These values are delivered by Oracle.

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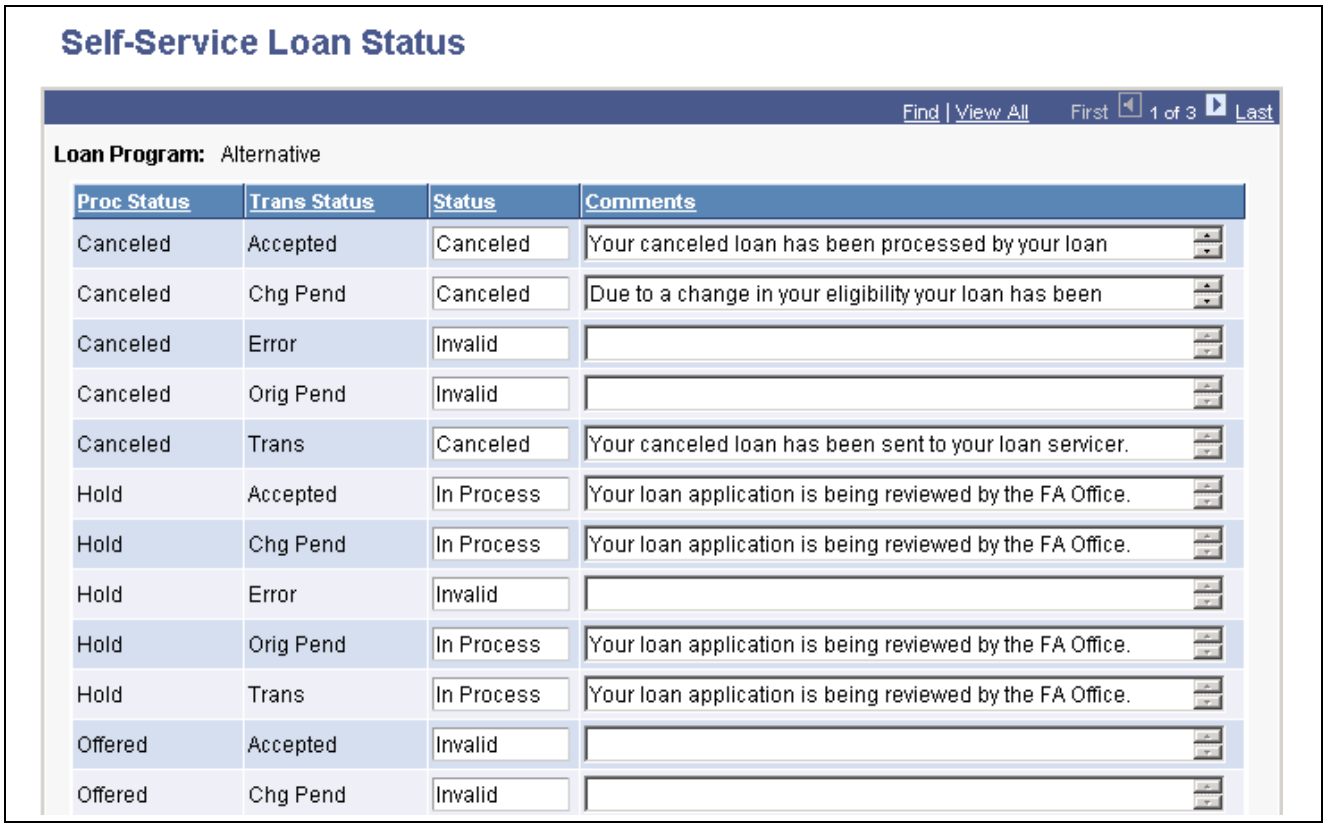
Modifying Loan Status Descriptions

Access the Self-Service Loan Status page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self-Service Loan Status).



Self-Service Loan Status

Find | View All First 1 of 3 Last

Loan Program: Alternative

Proc Status	Trans Status	Status	Comments
Canceled	Accepted	Canceled	Your canceled loan has been processed by your loan
Canceled	Chg Pend	Canceled	Due to a change in your eligibility your loan has been
Canceled	Error	Invalid	
Canceled	Orig Pend	Invalid	
Canceled	Trans	Canceled	Your canceled loan has been sent to your loan servicer.
Hold	Accepted	In Process	Your loan application is being reviewed by the FA Office.
Hold	Chg Pend	In Process	Your loan application is being reviewed by the FA Office.
Hold	Error	Invalid	
Hold	Orig Pend	In Process	Your loan application is being reviewed by the FA Office.
Hold	Trans	In Process	Your loan application is being reviewed by the FA Office.
Offered	Accepted	Invalid	
Offered	Chg Pend	Invalid	

Self-Service Loan Status page

You can view or modify the status and comments text that you want a student to view online.

Proc Status (processing status) — Indicates where the loan application is in the origination process between your institution and the loan servicer.

Trans Status (transaction status) — Indicates the current status of the loan application.

Creating User-Defined Text

Each self-service page has an area for additional explanatory text. The text resides in the message catalog. The system displays the message number to help you determine the text to include on a page. If you do not want a message on a particular page, you can delete the text in the message catalog or delete the message entirely. However, Oracle suggests that you delete only the text, not the reference number, so that you can add text as needed in the future.

You might add user-defined text to:

- Explain why disbursed awards cannot be updated.
- Explain why custom split awards cannot be updated.

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- Explain why subsidized and unsubsidized loans have automatic treatment.
- Explain why loans in transit cannot be updated.
- Provide general rules of navigation.
- Provide specific information, such as instructing students not to increase awards.

Message numbers 500 and greater for Message Set 14409 are designated as user-definable. Oracle delivers some message numbers with defined message text and explanation as examples.

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