Understanding the Financial Aid Status Page

This guide will cover:

- Navigating to the Financial Aid Status Page and the Hyperlinks on that page.
- Understanding basic Financial Aid Data Elements available on the View Financial Aid Status Page.
- Note: The Financial Aid Status page is a display-only page primarily suited for front office staff to provide a high level assessment of a student’s financial aid application for the aid year. Many of the fields and links displayed on the Financial Aid Status page are also on the Packaging Status Summary page.

Step One

Navigate to the following breadcrumb:

![Breadcrumb Image]

Step Two

Complete the following fields in the Search Criteria:

- Enter Student ID
- Enter Academic Institution – UCINN
- Enter Aid Year
- Click on Search
Step Three

The top half of the Financial Aid Status Page: Sections A, B and C

Section A

Section B

Section C
## Step Four
### Section A

### Financial Aid

#### Financial Aid Status

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aid Year</td>
<td>Federal Aid Year 2015 - 2016</td>
</tr>
<tr>
<td>Institution</td>
<td>UCINN</td>
</tr>
<tr>
<td>National ID</td>
<td></td>
</tr>
<tr>
<td>Campus ID</td>
<td></td>
</tr>
<tr>
<td>Birthdate</td>
<td>03/03/1996</td>
</tr>
<tr>
<td>Dependency</td>
<td>Dependent w/Primary EFC</td>
</tr>
<tr>
<td>EFC Status</td>
<td>Unofficial</td>
</tr>
<tr>
<td>App Date</td>
<td>01/10/2015</td>
</tr>
<tr>
<td>CPS Date</td>
<td>02/13/2015</td>
</tr>
<tr>
<td>Inst Date</td>
<td>11/20/2015</td>
</tr>
</tbody>
</table>

- **View of general biographical information** – Name, Aid year, Institution, National ID (USA – SSN), Campus ID (University of Cincinnati’s nine digit “M” number), Birthdate.
- **Dependency Status** as determined by the receipt of the Student’s FAFSA/FAFSA generated Institutional Student Information Report (ISIR)
- **EFC Status** – Current Status of the Student’s FAFSA Application. Valid Values are:
  - Official,
  - Rejected (rejected by federal processor on student’s ISIR)
  - Unofficial.
- **App Date** - The date that the Student’s INITIAL FAFSA was received by the U.S.Department of Education (DOE). This date does not change even if additional transactions are generated by the student, school or DOE. This value comes from the most recent loaded ISIR
- **CPS Date: MM/DD/YYYY** - The date that the most recently loaded ISIR into Catalyst was processed by the CPS/DOE. This date will change as other transactions are received and/or generated.
- **Inst Date: MM/DD/YYYY** - The date that the most recent ISIR was loaded into Catalyst. This date will change as other transactions are received and loaded into Catalyst.

- **Correction Status** – If a correction has been generated a status will display indicating the student’s current ISIR Correction Status. If no ISIR correction has been done, this field will be blank. Valid values are:
  - Accepted
  - Don’t Send
  - Pending
  - Send
  - Sent
  - Rejected

- **Correction Status Date** – The date when the Correction Status in Catalyst was updated. This does not necessarily mean that the correction was sent but that the Correction Status in Catalyst has been changed.
  - For example: If the Correction Status is “Sent” then this date would reflect the transmission date to CPS. If the Correction Status is “Accepted” then this date would reflect the date that the ISIR correction was uploaded in Catalyst.

- As with Correction Status this data element will be blank if no ISIR corrections have been generated.

**Step Five**

**Section B**

The three Icons/buttons highlighted above appear on many pages in the system, not just this Financial Aid Status Page. Clicking on one of these icons enables you to transfer directly from the page you are currently on to another page that will allow you to generate a communication, checklist, or comment for the student whose information you are currently viewing.

**Three C’s Hyperlink Icons**

- **Communications** - Transfers you to the appropriate Communications Management page, where you can create communications for the student. Communications may include letters, phone calls, meetings, emails, and faxes. In most cases, for Financial Aid purposes, communications will refer to emails sent to the student.
• **Checklists** - Transfers you to the appropriate Checklists Management page, where you can create checklists for a student. Checklists may be a lists of steps that must be performed, or documents that must be provided, or communications that are planned to occur, and so on. For Financial Aid purposes, checklists will predominantly refer to documents that the student must provide to the Financial Aid Office.

• **Comments** - Transfers you to the appropriate Comments page, where you can enter comments about the student.

**Step Six**

**Section C**

**Packaging Status Summary**

<table>
<thead>
<tr>
<th>Field</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aid Application Status</td>
<td>Active</td>
</tr>
<tr>
<td>Package Status</td>
<td>Completed</td>
</tr>
<tr>
<td>SAP</td>
<td>Undetmine</td>
</tr>
<tr>
<td>Review Status</td>
<td>Incomplete</td>
</tr>
<tr>
<td>INST Verification Status</td>
<td>Non Select</td>
</tr>
<tr>
<td>Verification Flag</td>
<td>Not Reqd</td>
</tr>
<tr>
<td>Disbursement Status</td>
<td>Not Select</td>
</tr>
</tbody>
</table>

• **Aid Application Status**: Indicates if the student’s financial aid application is available for processing. If a status is not present certain financial aid pages will not be available to view.
  - **Active**: This value is assigned automatically when you load the first ISIR into the system.
  - **Canceled**: Student’s aid application has been cancelled manually.
  - **Restricted**: Status entered manually indicating that the student has applied for restricted aid only.

• **Package Status**: Same value as the Aid Processing Status field on the Packaging Status Summary page. This status indicates where the student is in the Awarding Process.
  - **Applied**: Value is automatically populated when an ISIR or PROFILE application is received.
- **No Electronic Application:** No ISIR or Profile has been received.
- **Completed:** Student’s Award Package has been posted. The Posting of an award automatically updates this field to Complete, so Complete does not indicate that the student has been evaluated by one of the packaging plans.
- **Ready for Counselor Review:** Student is or should be reviewed by a financial aid counselor.
- **Ready for Packaging:** Student is ready to be packaged.
- **Repackage:** Student is ready for Repackaging. Value can be set by the External Award Load process.

- **SAP (Satisfactory Academic Progress):** Packaging uses this field to determine if the student is eligible for federal aid.
  - **Academic Plan:** Student does not meet SAP and has been placed on an academic plan that leads to meeting SAP. Federal awards can be made and authorized for disbursement.
  - **Meets SAP:** Student is meeting SAP standards and is eligible for federal aid and authorization and disbursement.
  - **Not Meet:** Student is not meeting SAP and federal awards are not made. If awards are made they will not be authorized or disbursed.
  - **Probation:** Student does not meet SAP but federal awards can be made and authorized and disbursed.
  - **Undetermine (undetermined):** A decision on the student’s SAP has not been made and federal awards are not made. If federal awards have been made, they are not authorized for disbursement.
  - **Warning:** Value used when determining SAP by term. A student who does not meet SAP for the first time is assigned this value. Federal award can be made and the award authorized and disbursed.

- **Review Status – For use with Institutional Verification** - Indicates if a review of the student’s financial aid application has been done. Manual update to Complete or Incomplete. Otherwise the field will be blank and no review is required or requested. (University of Cincinnati will not be using Institutional Verification at the time that this document was created)

- **INST Verification Status – For use with Institutional Verification** - Manual update to this field if student’s aid application is selected for an Institutional Verification Process. This field is defaulted to blank. Valid values are:
  - **Doc Select** – Student is required to submit a document for Institutional Verification
  - **Non Select** – Student has not been selected for Institutional Verification
  - **Select** – Student has been selected for Institutional Verification

(University of Cincinnati will not be using Institutional Verification at the time that this document was created)

- **Verification Flag – Relating to ISIR Verification and where the student is in the Verification Process. Valid Values are:**
  - **Blank** – Student has not been selected for Verification
  - **Complete** – Verification has been completed for this student
- **Not Req'd (Not Required)** – same as Blank, Student has not been selected for Verification (Default Value)
- **Pending** – Only used in the Auto Verification Process and indicates that the student has failed Auto Verification
- **Required** – Student has been selected by the Department of Education on their ISIR for Verification. This value is automatically populated when the ISIR is loaded to Catalyst.

• **Verification Status** – The status that will be reported back to COD on Pell Reporting and used in the Direct Loan Processes. Valid Values that are manually entered:
  - **Accurate** – ISIR transaction in 01 and all of the verification data elements are correct. No changes are needed.
  - **Calculated** – Pell eligibility has not changed even though other data elements have been updated.
  - **Not Select** – Student was not selected for Verification by DOE. **Note: this is the default value and must be changed when verification has been completed.**
  - **Not Verfd** – Student was selected for Verification but was not verified because they met one of the Department of ED’s verification exception criteria.
  - **Reprocess** – ISIR fields have been changed as a result of verification and the ISIR needs to be sent back to CPS for updates.
  - **Wht Doc (without documentation)** – First Pell payment was made before verification was completed. This value can only be used for on Pell Payment. Other Pell payments will require this value to be updated.

• **Disbursement Hold** – A hold on the student’s award that is specific to disbursement. Valid values are:
  - **Blank** – No holds are placed on this student’s financial aid awards
  - **Fed Aid (federal aid)** – Only awards identified on the Item Type as being Federal awards will be stopped from authorization and disbursement
  - **Institut (institutional)** – Only awards identified on the Item Type as being Institutional Aid will be stopped from authorization and disbursement
  - **Loan Hold** – Places a hold on the authorization and disbursement of loans

(University of Cincinnati will not be using Disbursement Holds at the time that this document was created)
Step Seven
The Middle Section of the Financial Aid Status Page

<table>
<thead>
<tr>
<th>Checklists</th>
<th>Personize</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Code</td>
<td>Description</td>
<td>Status Date</td>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F601TP</td>
<td>Citizenship Documentation</td>
<td>01/13/2016</td>
<td>Received</td>
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<table>
<thead>
<tr>
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<th>Find</th>
<th>View All</th>
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<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Method</td>
<td>Date Completed</td>
<td>Direction</td>
<td>Letter Code</td>
<td>Letter Description</td>
<td>Context</td>
<td>Context Description</td>
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<table>
<thead>
<tr>
<th>Comments</th>
<th>Personize</th>
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<th>Last</th>
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</thead>
<tbody>
<tr>
<td>Category</td>
<td>Comment Date</td>
<td>Comment</td>
<td>Entered By</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FVERIF</td>
<td>01/12/2016</td>
<td>Student was selected for Verification by DOE. All documents are in but there is a discrepancy on the untaxed income field. Adjusted ISIR and marked it as &quot;Send&quot; for it to be picked up in the next ISIR outbound process. Notified student.</td>
<td>Service Account, Conversion</td>
<td></td>
<td></td>
<td></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Loan Counseling Status</th>
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<th>First</th>
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<th>Last</th>
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</thead>
<tbody>
<tr>
<td>Aid Year</td>
<td>Loan Code</td>
<td>Description</td>
<td>Type</td>
<td>Requirement</td>
<td>Status</td>
<td>Date Completed</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>FA Term Information</th>
<th>Personize</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>12 of 2</th>
<th>Last</th>
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<tbody>
<tr>
<td>Term</td>
<td>Description</td>
<td>Career</td>
<td>Academic Plan</td>
<td>NSLUS Loan Year</td>
<td>Term Source</td>
<td></td>
</tr>
<tr>
<td>2161</td>
<td>Spring Semester 2015-16</td>
<td>UGRD</td>
<td>PSA28-AA</td>
<td>1st Year - Previously Attended</td>
<td>Program</td>
<td></td>
</tr>
<tr>
<td>2158</td>
<td>Fall Semester 2015-16</td>
<td>UGRD</td>
<td>PSA28-AA</td>
<td>1st Year - Never Attended</td>
<td>Term</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student Groups</th>
<th>Personize</th>
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<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Name</td>
<td>Description</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Edit Messages</th>
<th>Personize</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term</td>
<td>Msg Type</td>
<td>Msg Action</td>
<td>Date Completed</td>
<td>Msg Code</td>
<td>Description</td>
<td>Comments</td>
</tr>
</tbody>
</table>

3/2/2016  8
Step Eight
Checklists

- **Item Code**: The Checklist Item code assigned to a document required by the student. The hyperlink will open the Catalyst page directly on the Person Checklist Management page. If an error occurs or the Checklist Items are not a hyperlink, then you do not have permission for the Checklist Item.
  - Clicking on the Checklist Item brings you to the Checklist management – Person Page in Catalyst – Tab 2. Checklists Items can be updated from this page.

- **In the Checklist Item Table section:**
  - **Status**: The Status of the Checklist Item in Catalyst in real time. To update the Checklist to Completed (see Tab 1 or the Status listed above the Cehcklist Item Table Section) the Checklist Item should be updated to Completed or Waived.
  - **Status Date**: The date that the Status appearing to the left was entered in Catalyst.
**Step Nine**

Section E

**Communications**

- **Method**: Displays the type of communication being sent to the student. For Financial Aid purposes EMAIL will be the predominant type of Communication Method with students.

- **Date Completed**: A date will be present if the communication has been sent.

- **Letter Code**: The Communication Code created in Catalyst that specifies specific information that the student should be aware of regarding their Financial Aid Application or Award.

- **Context**: The Communication Context assigned to this Communication in Catalyst. The hyperlink will take you to the Catalyst Communication Detail page. If an error occurs or the Context value is not a hyperlink, then you do not have permission for the Communication Item.
Clicking on Context hyperlink brings you to the Communication Detail Page in Catalyst – Tab 1. Communications that have been completed can be viewed via this page.

To View the communication, click on “View Generated Communication” hyperlink.
- Click on the VIEW Button.

[Image of Catalyst software interface]

- Viewable Communication sent to the student:

[Image of Communication content]

- **Unsuccessful Outcome**: If checked, the communication was not successful.
- **Outcome Reason**: The reason that the communication was not successful.
Step Ten
Section F
Comments

- **Category**: Category that was created in the Comment Set-up in Catalyst.
- **Comment Date**: The Date that the Comment was added/revised in Catalyst
- **Comment**: Display of the statements added to Comment section either free hand or detailed in the Comment Set-up Table.
- **Entered By**: Display of Staff member who entered or updated the comment.

Step Eleven
Section G
Loan Counseling Status

*Display only of the same information as the Loan Counseling Data page.*

- **Loan Code**: Code in the Loan Table associated with the various Loan Types.
- **Description**: Displays the description of the loan type.
- **Type**: The type of Loan Counseling. Valid values are Entrance or Exit
- **Requirement**: For Loan Entrance Counseling only - Valid values are Annual or Multi-Year.
- **Status**: Status referring to the loan counseling requirement. Defaults to Pending. Will update to Completed if a valid date Completed is entered.
- **Date Completed**: Displays the date that the Entrance or Exit Loan Counseling was completed.
Step Twelve
Section H
FA Term Information

*Display of terms available for this student on the Financial Aid Term Page and the values assigned to this student. Note Catalyst Term CYYT formatting.*

- **NSLDS Loan Year:** Valid values range from 0 to 5 for Undergraduate Career (UGRD), .... for Graduate Career (GRAD), .... for LAW Career and .... for Medicine (MED) career. This value is automatically determined by tables set up in the Student Records Module.
- **Term Source:** Displays the source of FA Term Information. Valid Values are:
  - **Admissions:** Student is admitted but has not yet Matriculated
  - **Manual:** Student’s data was manually entered by a staff person.
  - **No Data:** Most common example of this source – when a student’s FA Term record in a previous year is Projected (student has not yet enrolled) and the FA Terms for the next aid year are created.
  - **Program:** Student exists in Student Records module but has not yet registered for classes for that term.
  - **Term:** Student is enrolled in classes for that term.
Step Thirteen
Section I
Student Groups

- Area that will display all of the Student Groups assigned to this student. Note that you must have Inquiry or Update security access to the Student Group for this to display.

Step Fourteen
Section J
Edit Messages

- **Term**: Displays the term for which the Edit Message is assigned.
- **Msg Type**: Values are Error, Informtnl (informational) and Warning.
- **Msg Action**: Current Action on the Edit Message. Values are None Taken, Pending, and Resolved. Edits set to Resolved do not Hold a Financial Aid Disbursement.
- **Date Completed**: Date the Msg Action was set.
- **Msg Code**: If displayed as a hyperlink, clicking on this value will open the Maintain User Edit Messages Page. If an error message appears or Message Code does not appear as a hyperlink, you do not have permission to the Maintain User Edit Messages.
- **Comments**: A View hyperlink will appear if you have access. Clicking on this hyperlink will take you to the Maintain User Edit Messages Comments page.
Step Fifteen
Section K
Financial Aid Hyperlinks

<table>
<thead>
<tr>
<th>TERM</th>
<th>ISIR Information</th>
<th>Database Matches</th>
<th>Need Summary</th>
<th>Pell Information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Financial Aid Awarded</td>
<td></td>
</tr>
</tbody>
</table>

**Term**: A brief summary of the student’s FA TERM Information with two embedded hyperlinks for Statistics and Form of Study.
**ISIR Information:** Brief display of FAFSA identifiers, Pell IDs, Citizenship, Verification Codes, C Flags and hyperlinks for Comment Codes.
**Database Matches**: Collection of Data Elements that need to be updated when addressing the verification of CCodes (ISIR SARC flag set to Y).
**Need Summary:** Summary of the student’s budget, family contribution, total need, total aid, unmet need and any over-award by federal and institutional rule sets. Embedded hyperlink to view EFC by month.

![Need Summary Table](image)

**Pell Information:** Summary of specific Pell information used for transmission to COD.

![Pell Information](image)
**Award Notification:** Not being used at University of Cincinnati.

**Financial Aid Awarded:** Summary of the student’s Financial Aid Awards for the Aid Year denoted on the Financial Aid Status Page.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Description</th>
<th>Offer Amount</th>
<th>Accept Amount</th>
<th>Authorized Amount</th>
<th>Disbursed Amount</th>
<th>Dep. Plan</th>
<th>Split Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>8143005101</td>
<td>Federal Pell Grant</td>
<td>5,775.00</td>
<td>5,775.00</td>
<td>0.00</td>
<td>0.00</td>
<td>CA</td>
<td>XX</td>
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<tr>
<td>8143005102</td>
<td>Federal SEOG (FA)</td>
<td>600.00</td>
<td>600.00</td>
<td>0.00</td>
<td>0.00</td>
<td>CA</td>
<td>FO</td>
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<tr>
<td>8143005103</td>
<td>Federal SEOG (SP)</td>
<td>600.00</td>
<td>600.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>SO</td>
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<tr>
<td>8143005104</td>
<td>Federal Direct Loan</td>
<td>117.00</td>
<td>117.00</td>
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<td>0.00</td>
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<td>FO</td>
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<td>8143005105</td>
<td>Federal Direct Loan (RI)</td>
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<td>SO</td>
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<tr>
<td>8143005106</td>
<td>Federal Direct Subsidized Loan</td>
<td>3,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>DA</td>
<td>FS</td>
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<tr>
<td>8143005107</td>
<td>Federal Direct Unsubsidized Loan</td>
<td>2,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>DA</td>
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<tr>
<td>8143005108</td>
<td>Federal Direct Parent PLUS Loan</td>
<td>12,915.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>DA</td>
<td>FS</td>
</tr>
</tbody>
</table>

**Perkins MPN Required:** If a hyperlink is viewable, clicking on the hyperlink will take you to the Perkins MPN page to view the MPN information. If just a display of “Perkins MPN Required” is viewable (not a hyperlink), then the Perkins MPN has not been signed and is required – see example below.

You have now completed the steps for viewing the Financial Aid Status Page.