Understanding the Packaging Status Summary Page

This guide will cover:

- Navigating to the Packaging Status Summary Page and the Hyperlinks on that page.
- Understanding basic Financial Aid Data Elements available on the Packaging Status Summary Page

The Packaging Status Summary page provides a summary of the wide variety of information of the Packaging routine uses. It includes federal and institutional verification status, disbursement hold, satisfactory academic progress and packaging information. Other processes or actions affect many of the fields on this page. You can change these fields either manually or using population selection.

Step One

Navigate to the following breadcrumb:
Step Two

Complete the following fields in the Search Criteria:

1. Enter Student ID
2. Enter Academic Institution – UCINN
3. Enter Aid Year
4. Click on Search

1. ID: Enter student ID.
2. Academic Institution is always UCINN
3. Examples are from Aid Year 2016
4. Click on "Search"
Step Three
Packaging Status Summary Page – Overview and Sections

Step Four
Packaging Status Summary – Hyperlinks

Five out of the six hyperlinks are also displayed on the FA Status Page.
Step Five
Packaging Status Summary – Hyperlinks

Click on the Calculation Override hyperlink

Step Six
Packaging Status Summary – Hyperlinks

- The Calculation Override hyperlink displays the formulas used to calculate Pell Grants throughout specific periods in the term. These values are stored in the Financial Aid Installation Set-up Tables
Step Seven
Packaging Status Summary – Hyperlinks

- **Background Information:** The Pell Grant Formulas are set in the FA Installation Tables. The set formulas for specific times of the term are located in Financial Aid Installation Default table. Currently the values are: *(these can change as full implementation of Catalyst occurs)*

  - **Pell Calculation Start:** Formula 1 - Full-time
  - **Pell Calculation Midterm:** Formula 1 - FA Load
  - **Pell Calculation Census:** Formula 1 - FA Load

- **Formula 1 — Full-time:** Directs the Pell calculation to divide the Pell Grant by the Pell Number of Terms and uses Full-time as the student's FA Load for each term.
- **Formula 1 — FA Load:** Directs the Pell calculation to divide the Pell Grant award by the Pell Number of Terms and uses the student's actual FA Load for each term.

Many of the hyperlinks on the Packaging Status Summary page are discussed in the Work Instruction for the View Financial Aid Status page. See: Work Instruction – View Financial Aid Status Page document for more detail on these various hyperlink items.

Step Eight
Packaging Status Summary – FA Status Page Shared data

- Detailed descriptions of the shared data elements and the possible values for these data elements are described in detail on the Financial Aid Status Work Instruction. See Financial Aid Status Page work instruction for more detail on these items.

**Tip:** The information, while viewable on the FA Status page, is updateable on the Packaging Status Summary page (security access is required).
### Step Nine

#### Packaging Status Summary – Other

<table>
<thead>
<tr>
<th>Status</th>
<th>Value</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>Undetermine</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>Required</td>
</tr>
<tr>
<td>Verification Status</td>
<td>Not Select</td>
</tr>
<tr>
<td>Disbursement Hold</td>
<td></td>
</tr>
</tbody>
</table>

#### Packaging Information

- **Scholarship Status**: Not Evaluated
- **Financial Aid Awarded**: Not Available
- **Award Notification**: Not Available

**Highlighted data elements are not currently being used by UC.**
Step Ten
Packaging Status Summary – Other Packaging Information

- Financial Aid Awarded hyperlink provides the same data as the Financial Aid hyperlink on the Financial Aid Status page.

Step Eleven
Packaging Status Summary – Other Packaging Information

- If a packaging plan or repackaging plan is listed, the student was most recently packaged or repackaged using that plan.
- For awarding purposes, all aggregates used in awarding will come from NSLDS.
You have now completed the steps for viewing the Packaging Status Summary Page.

<table>
<thead>
<tr>
<th>Aid Packaging Method</th>
<th>Self Service</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Auto:</strong> Packaged using Mass Packaging. View the packaging plan in the Packaging Plan ID field.</td>
<td><strong>Inquiry Access:</strong> Students are allowed to view their Financial Aid Awards.</td>
</tr>
<tr>
<td><strong>Counselor:</strong> A counselor packages the student manually or using Auto Packaging. If Auto Packaging is used, the packaging plan is in the Packaging Plan ID field.</td>
<td></td>
</tr>
<tr>
<td><strong>Not Pkgd:</strong> Not yet packaged. This is the default value until you manually change it.</td>
<td></td>
</tr>
</tbody>
</table>