Overview

Depending on your needs there are two different recommended steps for Pell Only Repackaging. We will cover both of these in this document.

Pell Repackaging can be easily be used for two scenarios:
1. Repackaged all Pell Recipients due to Pell Chart change.
2. Post FA Census Pell Adjustments.

Note that the Repackaging process does not change awards that are “Locked”. Awards are generally locked if entered manually (rather than letting the system assign the award amount). The system assumes locked awards are the way you want them to be. You can use the Population Update process to unlock awards, if you believe this is warranted. See the separate documentation on Population...
North Dakota University System
Campus Solutions -- Financial Aid
Pell Only Repackaging

**Update** for details. Note that if you unlock awards in the spring, students with manual adjustments in the fall (R2T4 for example) will be repackaged to the full amount.

To identify students who have a locked Pell award or students with a class start date that is on or later than the date the process is run, run query **NDU_FA_0251**, Pell Repackaging Exceptions. For these students, navigate to **View Packaging Status Summary** and override the Pell START and MIDTERM settings to 'formula 1 fa load', and save the component.

For students with an R2T4 adjustment if you enter a **R2T4** User Edit Message (at Financial Aid > Awards > Manage User Edit Messages, using Edit Message Type **Warning**, Edit Message Action **of No Action Taken**), then you can identify these students using query **NDU_FA_0209**, NDU Edit Messages, so you can exclude them from being unlocked.

**Repackaging Plan Setup**

| Set Up SACR > Product Related | Financial Aid > Awards > Repackaging Plan |

Create, revive, or update an existing Pell Only Repackaging plan.

There are two sets of equations for both fall and spring for the Even and Odd Years. Make sure to select the correct equation for your year and term. For full year Pell Repackaging choose the fall equation associated with the aid year you are wanting to repackage.

**Fall:**
- Odd Year: PKGUGRDSAPOY
- Even Year: PKGUGRDSAPEY

**Spring:**
- Odd Year: PKGUDSAPSPOY
- Even Year: PKGUDSAPSPEY

**Repackaging Rule:** Validate Item Type

**Method:** Item Type

**Item Type:** Select your Pell item type. If you’ve packaged

Since repackaging with our selection equations skip students who are set to Not Meets, you should consider running queries SAP Disqualified with Awards, **NDU_FA_0034_3** and SAP Previously Suspended Review, **NDU_0034_FA_1**.
with more than one, you’ll want to add a **Repackaging Rule** for each item type used.

**Disbursement Plan:** Leave Blank

**Split Code:** Leave Blank.

**Limited By:** Enter *Original Award*
Batch Repackaging

Repackaging follows the same basic steps as Packaging: Select Students, Assign a Plan, and Process. Additionally, you may want to unlock some locked Pell awards.

**Set Up SACR > System Administration > Utilities > Population Update > Population Update Process**

If it is your practice to let the system routinely assign Pell award amounts, then the only Pell awards that will be locked will be those that were manually adjusted for R2T4 or other valid reason.

If staff members enter Pell amounts routinely, then Pell awards that should be repackaged may be skipped. In that case, you may want to review locked awards and either unlock them on the Assign Awards to Student page, or unlock them in batch using Population Update.

**Example for Unlocking awards**

The .csv file for batch processing should have no header. It needs to have these fields in this order:
- EmplID
- Institution
- Aid Year
- Item Type to be unlocked
- Career
Repackaging All Pell Recipients

If you need to repackage all of your Pell recipients after a Pell Chart change or error you should complete the following steps:

1. Update your repackaging plan Selection Criteria repackaging plan. (see Repackaging Plan Setup)
2. Select Students to Repackage using an equation and review.
3. Assign Repackaging Plan and review.
6. Review

Select Students to Repackage

**Financial Aid > Awards > Repackaging > Select Students to Repackage**

The RP_Pell_Only equation is available with **Selection Tool Equation Engine**. This equation identifies Pell Eligible students (per ISIR).

**Financial Aid > Awards > Repackaging > View Selected Students**

As with Packaging, you have the opportunity to see the students selected to be repackaged.
Assign Repackaging Plan

Financial Aid > Awards > Repackaging > Assign Repackaging Plan

Create a run control to assign the Pell Only plan to the selected students.

Just as in Packaging, the Selection Definition is not available until it has been used in the Select process.

Financial Aid > Awards > Repackaging > View Assigned Plans

Again, you have the same option as in packaging to see which students have had the plan assigned. You can also view students by Plan. Students will fail the criteria if they are SAP ineligible or not an undergraduate.

Process Batch Repackaging

Financial Aid > Awards > Repackaging > Process Batch Repackaging

Create a run control to process the selected students with the assigned plan. Note you have Live and Simulation options.
Review

As with Packaging, you have the option of viewing repackaging summary, details, and errors:

- Query NDU_0141_FA, Failed to Mass Package
- Financial Aid > Awards > Repackaging > View Batch Repackaging Summary
- Financial Aid > Awards > Repackaging > View Batch Repackaging Details
- Financial Aid > Awards > Repackaging > View Batch Repackaging Errors

Query NDU_0074_FA, Load Vs. Pell Disbursement, is also available to help you evaluate awards.

Query NDU_FA_0174, Repackaging Results allows you to see which students had a change during a repackaging run, including one run in “simulation”.

Post-Census Pell Repackaging

After FA Load has been locked following the last day to add/drop classes you can begin making adjustments to Pell. To do this using batch repackaging you will want to follow slightly different steps than those detailed above. Prior to running batch repackaging we recommend that you notify your staff to refrain from making manual adjustments to awards for those students who have Pell.

Due to issues with the equation used in Repackaging All Pell Recipients when used for post-census adjustments we recommend completing the following:

1. Update your repackaging plan Selection Criteria repackaging plan. (see Repackaging Plan Setup)
2. Run Authorization for your Pell Item Types
3. Run the Authorization Failure List (Query NDU_FA_0033) and identify those students who failed authorization due to having enrollment less than fulltime.
4. Create a CSV of Pell students who need to be repackaged with no header:
   a. Institution
   b. Aid Year
North Dakota University System  
Campus Solutions -- Financial Aid  
Pell Only Repackaging

c. EMPLID
5. Select Students to Repackage using an external file and select your CSV. Review those selected.
6. Assign Repackaging Plan and review.
9. Review

**Note:** If you are planning to repack Pell prior to the official FA Census you will need to contact CS to have your Aid Processing Rule Set updated to UND2. This is because prior to Census our Pell Formula is set to require fulltime enrollment. The UND2 Aid Processing Rule Set is setup to look at FA Load.

**Select Students to Repackage**

<table>
<thead>
<tr>
<th>Financial Aid &gt; Awards &gt; Repackaging &gt; Select Students to Repackage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select Students for Repackaging</strong></td>
</tr>
<tr>
<td>Run Control Id: Select_Stu_to_Repack_COT</td>
</tr>
<tr>
<td>Report Manager</td>
</tr>
<tr>
<td>Process Monitor</td>
</tr>
<tr>
<td>Run</td>
</tr>
<tr>
<td><strong>Population Selection</strong></td>
</tr>
<tr>
<td>Selection Tool: External File</td>
</tr>
<tr>
<td>Attached File: NDU_FA_2018.csv</td>
</tr>
<tr>
<td>File Mapping: REPACKAGE_0245</td>
</tr>
<tr>
<td><strong>Parameters</strong></td>
</tr>
<tr>
<td>*Institution: UND01</td>
</tr>
<tr>
<td>*Aid Year: 2018</td>
</tr>
<tr>
<td>*Census: Federal Aid Year 2017-2018</td>
</tr>
</tbody>
</table>

For the **Selection Tool** select an **External File**.

A .csv list used with the **External File Selection Tool** must have no header row. Include these columns in this order:
Institution  
Aid Year  
EmplID  
The file Map for REPACKAGE_0245 will work for this purpose.

<table>
<thead>
<tr>
<th>Financial Aid &gt; Awards &gt; Repackaging &gt; View Selected Students</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Batch Repackaging Students</strong></td>
</tr>
<tr>
<td>Academic Institution: MISUB</td>
</tr>
<tr>
<td>Aid Year: 2009</td>
</tr>
<tr>
<td>Selection Definition: EQUATION RP_PELL ONLY</td>
</tr>
<tr>
<td><strong>ID</strong></td>
</tr>
<tr>
<td>011</td>
</tr>
</tbody>
</table>
### Assign Repackaging Plan

**Financial Aid > Awards > Repackaging > Assign Repackaging Plan**

Create a run control to assign the **Pell Only** plan to the selected students.

Just as in Packaging, the **Selection Definition** is not available until it has been used in the **Select** process.

### Financial Aid > Awards > Repackaging > View Assigned Plans

Again, you have the same option as in packaging to see which students have had the plan assigned. You can also view students by Plan. Students will fail the criteria if they are SAP ineligible or not an undergraduate.

### Process Batch Repackaging

**Financial Aid > Awards > Repackaging > Process Batch Repackaging**

Create a run control to process the selected students with the assigned plan. Note you have **Live** and **Simulation** options.
Review

As with Packaging, you have the option of viewing repackaging summary, details, and errors:

- Query NDU_0141_FA, Failed to Mass Package
- Financial Aid > Awards > Repackaging > View Batch Repackaging Summary
- Financial Aid > Awards > Repackaging > View Batch Repackaging Details
- Financial Aid > Awards > Repackaging > View Batch Repackaging Errors

Query NDU_0074_FA, Load Vs. Pell Disbursement, is also available to help you evaluate awards.

Query NDU_FA_0174, Repackaging Results allows you to see which students had a change during a repackaging run, including one run in “simulation”.

**Financial Aid > View Packaging Status Summary**

When students have been repackaged, their Award Processing Status gets set to Packaging Completed and a Repackaging Plan ID is populated on the Assign Awards to a Student and View Packaging Status Summary screens:
On-Line Repackaging

Financial Aid > Awards > Award Processing > Assign Awards to a Student(Award Entry)

There is a Repackage capability on Award Entry similar to the Package Retrieve capability. Validate and Post after you retrieve the PELL_ONLY repackaging plan.

If the Pell doesn’t adjust and it should, check that the award is not locked. Uncheck the lock field as necessary and repeat the Repackaging step.