North Dakota University System
Campus Solutions - Financial Aid
Single Term Packaging

In a nutshell:

1. When **Ready Package** runs, it identifies students who only have a single FA Term built for the aid year. Those students get:
   a. An **Aid Processing Status** of “Ready for Counselor Review” and
   b. A “one term” Edit Message.

2. **NDU Ready One Term Calc** can be run to find the students who are “Ready for Counselor Review” and have a “one term” Edit Message. Based on the budget duration you put on the run control, it:
   a. Puts these students in a table used by the INAS Batch process;
   b. Closes the “one term” Edit Message;
   c. Sets the students’ **Aid Processing Status** to “Ready to Package”.

3. **NAS Batch Calculation** can be run to do the actual EFC proration.

4. The Packaging processes can then be run. There is a suggestion in the Setup section, below, on modifications you can make to your normal packaging plans. A Spring Only packaging plan could be used to ensure your Sub and Unsub are awarded the way you want them to be.

<table>
<thead>
<tr>
<th>Processing</th>
<th>NDU Applications &gt; NDU Financial Aid &gt; NDU Ready Package</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run <strong>NDU Ready Package</strong> as you would normally run it; it identifies students with only one active term on FA Term for the aid year, sets their <strong>Aid Processing Status</strong> to ”Ready for Counselor Review” and adds a One Term (ONETRM) Edit Message.</td>
<td></td>
</tr>
</tbody>
</table>

To prorate EFCs as part of your packaging so students have the correct need, run the following processes after running Ready Package:

<table>
<thead>
<tr>
<th>NDU Applications &gt; NDU Financial Aid &gt; Processes &gt; NDU Ready One Term Calc</th>
</tr>
</thead>
<tbody>
<tr>
<td>The NDU Ready One Term process updates the FM Duration for those students and makes them ready for the INAS Batch Calc process to be run to prorate their EFC.</td>
</tr>
</tbody>
</table>

It also sets the **Aid Processing Status** Ready to Package and closes the One Term (ONETRM) Edit Message

The normal budget durations would be:
- 4 for fall
- 5 for spring
- 3 for summer.
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Financial Aid > File Management > INAS Batch Calculation

Run INAS Batch Calc to actually recalculate the selected EFCs to the prorated value.

Use Application Type “F”, and Clear Calc Requests “Y”

Batch INAS Calculation

Run ControlID: INAS_Batch_Calc_dj

Report Manager  Process Monitor

Process Name: FAPINCLC

Parameters

<table>
<thead>
<tr>
<th>Institution</th>
<th>BSC01</th>
<th>Bismarck State College</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aid Year</td>
<td>2015</td>
<td>Federal Aid Year 2014-2015</td>
</tr>
<tr>
<td>Application Type</td>
<td>F</td>
<td>Federal</td>
</tr>
<tr>
<td>Clear Calc Requests?</td>
<td>N</td>
<td>No</td>
</tr>
</tbody>
</table>

Reporting Tools > Query Viewer

You may use query NDU_0045_FA, One Term Package Status, to review which students are being/have been processed for one term.

Complete your normal mass packaging processes from here:

Financial Aid > Awards > Need Summary Validation
Financial Aid > Awards > Mass Packaging > Select Students
Financial Aid > Awards > Mass Packaging > Assign Plans – Only assign plans that have been modified for one term processing.
Financial Aid > Awards > Mass Packaging > Process Mass Packaging

Do clean-up, as appropriate, which might include:

NDU Applications > NDU Financial Aid > Reports > NDU Pell Grant with BA
Reporting Tools > Query > NDU_0141_FA, Failed to Mass Package
NDU Applications > NDU Financial Aid > Report > NDU Overaward Report
NDU Applications > NDU Financial Aid > Reports > NDU 2 Yr Prog Loan Eligibility
Set Up

For each item type in each of your packaging plans, ensure that the maximum term award on Tab 4 is one half your normal annual award.

Note that this will not have an adverse effect on your full year awarding, as these are term amounts.

Although your item type number may vary, the awards you will want to check are:

- Pell,
- SEOG,
- Perkins,
- Nursing Loan,
- Work Study,
- Subsidized Stafford,
- Unsubsidized Stafford,

You may also want to consider adding one term subsidized and one term unsubsidized student loans so they can be added to your packaging plan:

See below for an options setting up loans in your packaging plans. There is an on-going discussion about whether you should pro-rate subsidized loans. Below is information in the event that you do want to do the proration.

If you want the student’s unsub eligibility to be prorated, there is information about how to do that, as well.
If you add any additional item types to a packaging plan, note that for an item type to be available to a packaging plan, the FA Item Type setup must have Auto Package checked on the second tab.

On the packaging plan, add a row on the first tab.

On the Packaging Rules 1 tab, find your Subsidized Stafford. In this case, it is Sequence Nbr 40. Add Selection Criteria of NDU_Two_Terms. Only Students who have a fall and a spring term active on FA Term will be selected by this row.
After your Subsidized Stafford row enter two more Subsidized Stafford rows. In this example, we’ve added a 43 and a 45, as Subsidized Stafford for the full year is Nbr 40 and Unsubsidized Stafford is Sequence Nbr 50.

Set the Selection criteria for one of your new rows as **NDU_Fall** and for the other as **NDU_Spring**.

In this example, we used different Sub Stafford Item Types for Fall/Spring than was used for the academic year. If you use a different item type for the fall only/spring only awards than you use for the academic year, you could then use on-line packaging when you determine the student will not be attending a term and loans have been canceled.

Note that the FA Term would need to be Inactive for one term in order for the one-term packaging equations to be invoked.
On the Packaging Rules 2 tab, find the new rows you just added and change the Disbursement Plan to Override Default and enter the appropriate Disbursement Plan code.

Change the Split Code to Override Default and enter the appropriate Split code.

Note that the Award Action defaults to Offer/Accept. Ensure you change it to Offer.

On the Packaging Rules 1 tab, find your Unsubsidized Stafford. In this case, it is Sequence Nbr 50. Add Selection Criteria of NDU_Two_Terms. Only Students who have both a fall and a spring term active on FA Term will be selected by this row.
On tab Packaging Rules 1 add two rows for Unsub after the existing Unsub row, and put appropriate selection criteria and amount equations.

In this example, sequence numbers 53 and 55 were added.

Set the Selection criteria for one as **NDU_Fall** and for the other as **NDU_Spring**.

Add the limiting equation **NDU_LIMIT_US** if you want the students’ annual student award amount prorated to one term amounts.

In this example, we used a different Unsub Stafford Item Types for Fall/Spring than was used for the academic year. If you use a different item type for the fall only/spring only awards than you use for the academic year, you could then use on-line packaging when you determine the student will not be attending a term and loans have been canceled.

Note that the FA Term would need to be Inactive for one term in order for the one-term packaging equations to be invoked.
On the Packaging Rules 2 tab, find the new rows you just added and change the Disbursement Plan to Override Default and enter the appropriate Disbursement Plan code.

Change the Split Code to Override Default and enter the appropriate Split code.

Note that the **Award Action defaults to Offer/Accept**. Ensure you change it to **Offer**.

Repeat the process for each Packaging Plan that you normally assign either on-line or in batch.