Note: This document is still under review, and subject to revisions.

Assign Awards to a Student
(Draft)

PATH: Financial Aid > Awards > Awards Processing > Assign Awards to a student

Before reviewing Awards, you may want to start by checking View Financial Aid Status or View Packaging Status Summary pages to see the student’s Packaging status. Before or during packaging you may also wish to see a student’s Award Activity, Term Award Summary, Awards as of a specific Date and/or Aggregate Aid & NSLDS information.

Packaging will usually be a batch process (“auto-packaging”). Students will be selected into one of the following Packaging Plans based upon selection criteria (e.g. Career).

Undergraduate:
- UG = FAFSA Filer, Undergraduate Standard (including MCAP Eligible, Gift Aid < Need)
- MCAP = FAFSA Filer, Undergraduate, MCAP Eligible, Gift Aid > Need
- CALDREAM = Cal Dream App Filer
- RC_HONOR = RC Honorary

Graduate
- GRADUATE = FAFSA Filer, Graduate

Law
- LAW = FAFSA Filer, Law

NOTE: Students who qualify for Conditional Awards only (STATUS: Will File Tax, or Selected for Verification/Not Completed) will be assigned into the same Packaging Plan as students who qualify for real awards. However, they will be awarded Conditional Awards.

Process:
To review and/or edit an awards package navigate to the Assign Awards to a Student page. Look up a specific student for the aid year you wish to view/edit.
Student Aid Package tab: This page contains the Packaging Plan ID and Award information for packaged students. Those fields will be blank for students who have not been packaged yet.

Need Summary tab: This page shows the Need Summary by Award Period (e.g. Academic Year or “non-standard” Summer). You can review the EFC and its status. You can also review the need that UCB is trying to meet. This gives you an idea of why the budgets and awards have calculated certain amounts.

Term Summary tab: Displays info from the current Maintain FA term page.
EDITING EXISTING PACKAGING

Let’s return to the first tab Student Aid Package.

Normally this is populated via a Batch process (auto-packaging), but you can run it manually if needed.

Awards will show in a particular order/hierarchy based on how they will be assigned. Scholarships at the top, then Grants, then Need Based Loans at bottom. The hierarchy is important because the system will assign awards in order and we want to ensure students are using GiftAid first (money they do not have to repay) before taking out a loan.

If the awards assigned automatically did not meet the need of the student, we can add more awards manually.

Click the Plus button (+) on an existing award row to add a new award. It doesn’t matter which plus button is clicked, because we will update the number to determine where in the hierarchy the new award will go.

Fill in the following columns:
Number: Notice that the numbers are ordered in increments of 10. When adding pick a number that will insert the award in the proper hierarchy. Pick any number, as long as it’s not already used (e.g. 20) and as long as it’s in the same range as the other types of loans. For example, use a low number (e.g. 03, 09) if you want the award to be added into the top of the hierarchy or use a high number to add it to the end of the list if it’s an unsubsidized loan that should be assigned only when all Gift Aid is used up.

NOTE: The system will resort and renumber the awards next time you come to the page. For example, the number 05 would become 10, the existing 10 would change to 20. So don’t be startled if the number you chose changes to another next time you view the page.

In this example, we will choose 05, to ensure the award goes to the top.

Action: B- Offer/Accept for Scholarships & Grants or O-Offer for Loans (since we don’t accept Loans on a student’s behalf)

Item Type: Click the Magnifying glass lookup icon. Search either Description “Begins with” or “Contains” to find the award you need to add. The system will not allow duplicate Awards. You will also see an error if you pick an award that does not have enough funds.

Offered: Type in the amount.

Accepted: Leave blank. Scholarships and Grants will accept automatically, loans must be accepted by the student.

Disbursement Plan: AY – Academic Year will default. (Note: You can change to DL for Direct Loan).

Split Code: The defaulted is FS – Fall & Spring which will split across 2 semesters. If needed, you can manually change it to FL for just Fall, SP for just Spring, or XX – a custom split for Pell Grants.

NOTE: If you make an error, click Reset. As long as you haven’t clicked POST you can Reset any time.

When ready, click the Validate button to validate that the Awards assigned to the student meet the Need allocated for the student.
A pop-up will appear confirming validation is complete. It also informs us that if the Awards assigned to the student cross the Need allocated for the student then Award amounts will be adjusted per the Need.

Click OK to acknowledge the prompt and return to the awards. Observe that some amounts have changed now that you have added a new award. Notice your new award is at the top of the list now.

An active link labelled “Message” will display to the right of one or more awards. Make sure to click and read all of them. The message will clarify why adjustments may have been made.

**NOTE:** Make sure to read the entire message for each award. Sometimes the Validation pop-up states validation was successful, but there is qualifying information in one of the messages. If you don’t read it and fix the issue, it could wipe out a student’s package. If you see a message you don’t understand, stop and ask someone more knowledgeable before proceeding. Or cancel the transaction until you get more information.
Example of a message:

For example, in this case, the system is letting us know that the Workstudy award has been reduced now that the student has received the scholarship funds.

If after reading all messages everything is ready, click Return to go back to the awards.

Click on the Post button to confirm the edits to the package are actually saved.

You will see a message confirming the Posting process is complete and the student is Packaged.
Click OK. The information is now saved. It will now populate on the student’s CalCentral page in the Awards section.

Note: The next you visit the page the numbers will reorder in sequences of 10, so the 05 will change to 10, the 10 will update to 20, etc.

**Manual Packaging of student without a package**

Normally packaging is done through a batch, but it can be done manually if necessary.

Look up the student.

On the **Student Aid Package** page, use the lookup icon to pick the appropriate **Packaging Plan ID** (note: only values allowed for that Career will be shown).

In this case, we will select **UG – Undergrad**

Click the **Retrieve** Button.
Now you can see the Awards assigned to the student Under Awards Tab. The system will show all awards that were evaluated.
If the awards didn't meet the need of the student, click the plus button on an existing Award row to add a new Award, per the example above.

Choose appropriate data for the following columns: Item Type, Offered, Accepted, Disb Plan, Split Code.
When ready, click the **Validate** button to validate the Awards assigned to the student meets the Need allocated for the student.

At this point if the Awards assigned to the student cross the Need allocated for the student then the Award amount will be adjusted per the Need. You will see a message notifying you that the validation is complete and the data is ready to be posted. Click **OK** to acknowledge the message and proceed to next step. Notice that all the lines with zero amounts have disappeared.

If you perceive an error, click **RESET** button to revert. You can do this at any time prior to clicking the **Post** button.

Otherwise, if you are satisfied with the package, click the **Post** button to confirm the package and save.

You will see a message confirming the Posting process is complete and the student is Packaged.
Click **OK** to proceed to acknowledge the message.

You have successfully packaged this student.

Note: There is no need to Save because clicking Post saved the data.

**REPACKAGING**

Changes that a student makes on CalCentral (reporting outside source of funding, changing their housing), will trigger an automatic recalculation and repackage the student. If staff make updates to a student’s budget (such as adding an additional budget item), the system will repackage the student. However, occasionally, if something has just changed for the student and all the update processes haven’t had a chance to run, you can manually repackage the student.

Search and find a student.

On the **Student Aid Package** tab, click on the lookup for the **Repackaging Plan ID**. Select **FULL**.
Click **Repackage Button**.

The system will rerun the packaging algorithms with the new information and reevaluate the student’s needs against all the awards. A pop-up will inform you that the Award Validation completed and that all messages should be read.

Click **OK**.

You can now see the updated staging tables with repackaged Awards assigned to the student under Awards Tab. Click on each message and read through them. For example, the system may explain that a grant (MCAP, etc.) did not award any money because the student did not meet the selection criteria.
If the awards didn't meet the need of the student, click the Plus button (+) on an existing award row to add a new award to the student.

Click **Validate** button to validate the awards assigned to the student that will meet the need allocated for the student.

You will see a Prompt to notify the validation is complete and the data is ready to be Posted.

Click **OK** to proceed to next step. Review the awards.

If you need to cancel this transaction at anytime prior to clicking Post, you can click the Reset button.
Click on the **Post** button to confirm the edits to the package are actually saved and post to the student’s CalCentral Page.

You will see a Prompt to notify the Posting process is complete and the student is Repackaged.
Click OK to proceed to acknowledge the message.

The updated data will now show on the student’s CalCentral “Awards” card.

Note: There is no need to Save, clicking the Post button to run the process has already saved the information.

If you are done, use the menu to navigate to a new page or click Sign Out. When you are finished, make sure to exit the browser as well. Do not leave open browser windows unattended.

Support

For questions or assistance, please contact Campus Shared Services IT:

• Call 510-664-9000 (press option 6 to reach SIS support)
• Email: sishelp@berkeley.edu
• Submit a ticket: https://berkeley.service-now.com/ess/create_incident