

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.

## Award Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

**Search Criteria**

ID:  [Search](#)  
 Academic Institution:  UCB01 [Search](#)  
 Aid Year:  2017 [Search](#)  
 National ID:  [Search](#)  
 Campus ID:  [Search](#)  
 Last Name:  [Search](#)  
 First Name:  [Search](#)

[Search](#)
[Clear](#)
[Basic Search](#)
[Save Search Criteria](#)

**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.

[Student Aid Package](#)
[Need Summary](#)
[Term Summary](#)

Student, Shandrika  
 Aid Year: 2017 Federal Aid Year 2016-2017  
 ID:  UCB01 [Search](#)

Career:  UGRD [Search](#) Undergrad  
 Packaging Plan ID:  UG [Search](#) [Retrieve](#)  
 Repackaging Plan ID:  [Search](#) [Repackage](#)

Package Status:  Completed  
 Aggregate Source:  Default [Validate](#)  
 Award Period:  Both [Post](#) [Reset](#)

[Award Notification](#)

| Award   | Status |
|---|--------|
| *Nbr Action Career Item Type Description Offered Accepted Disb Plan *Split Code   |        |
| 10 <input type="checkbox"/> <a href="#">Search</a> UGRD 946200100001 Conditional Federal Pell Grant 5,165.00 5,165.00 AY XX <a href="#">Search</a> Disbursement + |        |
| 20 <input type="checkbox"/> <a href="#">Search</a> UGRD 946100100001 Conditional Cal Grant A 12,294.00 12,294.00 AY XX <a href="#">Search</a> Disbursement +      |        |
| 30 <input type="checkbox"/> <a href="#">Search</a> UGRD 942102900001 Conditional UC Undergraduate G 2,511.00 2,511.00 AY FS <a href="#">Search</a> Disbursement + |        |
| 40 <input type="checkbox"/> <a href="#">Search</a> UGRD 961100100001 Conditional Subsidized Fed Dir 5,500.00 0.00 AY FS <a href="#">Search</a> Disbursement +     |        |
| 50 <input type="checkbox"/> <a href="#">Search</a> UGRD 951100100001 Conditional Work-Study 1,583.00 0.00 AY FS <a href="#">Search</a> Disbursement +             |        |
| 60 <input type="checkbox"/> <a href="#">Search</a> UGRD 961110100001 Conditional Unsubsidized Fed D 613.00 0.00 AY FS <a href="#">Search</a> Disbursement +       |        |

[Save](#)
[Return to Search](#)
[Notify](#)

**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.

[Student Aid Package](#)
[Need Summary](#)
[Term Summary](#)

Student, Shandrika  
 Aid Year: 2017 Federal Aid Year 2016-2017  
 ID:  UCB01 [Search](#)

**Need Summary by Award Period** [Find](#) [First](#) [1 of 2](#) [Last](#)

| Award Period:                | Academic  | EFC Status:                   | Official  |
|------------------------------|-----------|-------------------------------|-----------|
| Fed Year COA:                | 27,666.00 | Inst Year COA:                | 27,666.00 |
| Prorated EFC:                | 613       | Institutional EFC:            | 0         |
| Fed Need:                    | 27,053.00 | Inst Need:                    | 27,666.00 |
| Educational Resources:       | 0         | Educational Resources:        | 0         |
| N/B Aid (Fed):               | 0.00      | N/B Aid (Inst):               | 0.00      |
| Special Need/Cost Aid (Fed): | 0.00      | Special Need/Cost Aid (Inst): | 0.00      |
| Total Aid (Fed):             | 0.00      | Total Aid (Inst):             | 0.00      |
| Unmet Need (Fed):            | 27,053.00 | Unmet Need (Inst):            | 27,666.00 |
| Unmet COA(Fed):              | 27,666.00 | Unmet COA(Inst):              | 27,666.00 |

[Save](#)
[Return to Search](#)
[Notify](#)

**Term Summary** tab: Displays info from the current Maintain FA term page.

Student Aid Package
Need Summary
**Term Summary**

Student, Shandrika  
Aid Year: 2017 Federal Aid Year 2016-2017
ID:  
Institution: UCB01

**Term Budget** Find First 1 of 2 Last

|                    |           |            |            |                          |
|--------------------|-----------|------------|------------|--------------------------|
| Term:              | 2172      | 2017 Spr   | Career:    | UGRD Undergraduate       |
| Dependency Status: | DEP       | Housing:   | Off Campus | Inst Term COA: 13,833.00 |
| Academic Level:    | Senior    | Residency: | Res        | Fed Term COA: 13,833.00  |
| FA Load:           | Full-Time | Total Aid: | 0.00       |                          |

**FA Term Data** Find First 1 of 2 Last

|                       |           |            |         |                     |
|-----------------------|-----------|------------|---------|---------------------|
| Term:                 | 2172      | 2017 Spr   | Career: | UGRD Undergraduate  |
| Weeks of Instruction: | 15        | Prim Prog: | UCLS    | Expected Grad Date: |
| Academic Level:       | Senior    | Acad Plan: | 25789U  |                     |
| FA Load:              | Full-Time | Sub-Plan:  |         |                     |
| NSLDS Loan Year:      | 4th Year  |            |         |                     |

Save Return to Search Notify

### 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.

Student Aid Package
Need Summary
Term Summary

Student, Shandrika  
Aid Year: 2017 Federal Aid Year 2016-2017
ID:  
Institution: UCB01

Career: UGRD Undergrad
Packaging Plan ID: UG Retrieve
Repackaging Plan ID: Repackage
Package Status: Completed
Aggregate Source: Default
Award Period: Both
Award Notification
Validate
Post
Reset

| Award | Status | *Nbr | Action       | Career                         | Item Type | Description | Offered | Accepted | Disb Plan    | *Split Code |  |
|-------|--------|------|--------------|--------------------------------|-----------|-------------|---------|----------|--------------|-------------|--|
| 10    |        | UGRD | 946200100001 | Conditional Federal Pell Grant | 5,165.00  | 5,165.00    | AY      | XX       | Disbursement | +           |  |
| 20    |        | UGRD | 946100100001 | Conditional Cal Grant A        | 12,294.00 | 12,294.00   | AY      | XX       | Disbursement | +           |  |
| 30    |        | UGRD | 942102900001 | Conditional UC Undergraduate G | 2,511.00  | 2,511.00    | AY      | FS       | Disbursement | +           |  |
| 40    |        | UGRD | 961100100001 | Conditional Subsidized Fed Dir | 5,500.00  | 0.00        | AY      | FS       | Disbursement | +           |  |
| 50    |        | UGRD | 951100100001 | Conditional Work-Study         | 1,583.00  | 0.00        | AY      | FS       | Disbursement | +           |  |
| 60    |        | UGRD | 961110100001 | Conditional Unsubsidized Fed D | 613.00    | 0.00        | AY      | FS       | Disbursement | +           |  |
| 70    |        | UGRD |              |                                | 0.00      | 0.00        |         |          |              | +           |  |

Save Return to Search Notify

Student Aid Package | Need Summary | Term Summary

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.

The screenshot shows the 'Student Aid Package' interface. At the top, there are fields for 'Career' (UGRD), 'Packaging Plan ID' (UG), and 'Award Notification' (Completed). Below these are buttons for 'Retrieve', 'Repackage', 'Validate', 'Post', and 'Reset'. A table of awards is displayed with columns: \*Nbr, Action, Career, Item Type, and Description. The table lists several awards, including 'Conditional Federal Pell Grant', 'Conditional Cal Grant A', 'Conditional UC Undergraduate G', 'Conditional Subsidized Fed Dir', 'Conditional Work-Study', and 'Conditional Unsubsidized Fed D'. A 'Look Up Item Type' dialog box is open, showing search criteria: SetID: UCB01, Aid Year: 2017, Item Type: begins with, and Description: contains H. The dialog box also has a 'Search Results' section showing a list of item types and descriptions.

**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.

Career:  Undergrad  
Packaging Plan ID:  Retrieve  
Repackaging Plan ID:  Repackage

Package Status:   
Aggregate Source:   
Award Period:

Award Notification

| Award | Status | *Nbr | Action       | Career                         | Item Type | Description | Offered | Accepted | Disb Plan    | *Split Code |  |
|-------|--------|------|--------------|--------------------------------|-----------|-------------|---------|----------|--------------|-------------|--|
| 10    |        | UGRD | 946200100001 | Conditional Federal Pell Grant | 5,165.00  | 5,165.00    | AY      | XX       | Disbursement | +           |  |
| 20    |        | UGRD | 946100100001 | Conditional Cal Grant A        | 12,294.00 | 12,294.00   | AY      | XX       | Disbursement | +           |  |
| 30    |        | UGRD | 942102900001 | Conditional UC Undergraduate G | 2,511.00  | 2,511.00    | AY      | FS       | Disbursement | +           |  |
| 40    |        | UGRD | 961100100001 | Conditional Subsidized Fed Dir | 5,500.00  | 0.00        | AY      | FS       | Disbursement | +           |  |
| 50    |        | UGRD | 951100100001 | Conditional Work-Study         | 1,583.00  | 0.00        | AY      | FS       | Disbursement | +           |  |
| 60    |        | UGRD | 961110100001 | Conditional Unsubsidized Fed D | 613.00    | 0.00        | AY      | FS       | Disbursement | +           |  |
| 5     | B      | UGRD | 941400420000 | Walter A. Haas Scholarship     | 500.00    | 500.00      | AY      | FS       |              | +           |  |

[Student Aid Package](#) | [Need Summary](#) | [Term Summary](#)

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.

Student: Shandrika  
Aid Year: 2017 Federal Aid Year 2016-2017

Career:  Undergrad  
Packaging Plan ID:  Retrieve  
Repackaging Plan ID:  Repackage

Award Validation completed successfully. Please review each award message. (14420,57)  
The award amount may have been adjusted as a result of the Validation process.

| Award | Status | *Nbr | Action       | Career                         | Item Type | Description | Offered | Accepted | Disb Plan    | *Split Code |  |
|-------|--------|------|--------------|--------------------------------|-----------|-------------|---------|----------|--------------|-------------|--|
| 5     |        | UGRD | 941400420000 | Walter A. Haas Scholarship     | 500.00    | 500.00      | AY      | FS       | Disbursement | +           |  |
| 10    |        | UGRD | 946200100001 | Conditional Federal Pell Grant | 5,165.00  | 5,165.00    | AY      | XX       | Disbursement | +           |  |
| 20    |        | UGRD | 946100100001 | Conditional Cal Grant A        | 12,294.00 | 12,294.00   | AY      | XX       | Disbursement | +           |  |
| 30    |        | UGRD | 942102900001 | Conditional UC Undergraduate G | 2,511.00  | 2,511.00    | AY      | FS       | Disbursement | +           |  |
| 40    |        | UGRD | 961100100001 | Conditional Subsidized Fed Dir | 5,500.00  | 0.00        | AY      | FS       | Disbursement | +           |  |
| 50    |        | UGRD | 951100100001 | Conditional Work-Study         | 1,083.00  | 0.00        | AY      | FS       | Disbursement | Message +   |  |
| 60    |        | UGRD | 961110100001 | Conditional Unsubsidized Fed D | 613.00    | 0.00        | AY      | FS       | Disbursement | +           |  |

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.

| Award |                          | Status |              |                                |           |           |           |             |              |         |   |
|-------|--------------------------|--------|--------------|--------------------------------|-----------|-----------|-----------|-------------|--------------|---------|---|
| *Nbr  | Action                   | Career | Item Type    | Description                    | Offered   | Accepted  | Disb Plan | *Split Code |              |         |   |
| 5     | <input type="checkbox"/> | UGRD   | 941400420000 | Walter A. Haas Scholarship     | 500.00    | 500.00    | AY        | FS          | Disbursement |         | + |
| 10    | <input type="checkbox"/> | UGRD   | 946200100001 | Conditional Federal Pell Grant | 5,165.00  | 5,165.00  | AY        | XX          | Disbursement |         | + |
| 20    | <input type="checkbox"/> | UGRD   | 946100100001 | Conditional Cal Grant A        | 12,294.00 | 12,294.00 | AY        | XX          | Disbursement |         | + |
| 30    | <input type="checkbox"/> | UGRD   | 942102900001 | Conditional UC Undergraduate G | 2,511.00  | 2,511.00  | AY        | FS          | Disbursement |         | + |
| 40    | <input type="checkbox"/> | UGRD   | 961100100001 | Conditional Subsidized Fed Dir | 5,500.00  | 0.00      | AY        | FS          | Disbursement |         | + |
| 50    | <input type="checkbox"/> | UGRD   | 951100100001 | Conditional Work-Study         | 1,083.00  | 0.00      | AY        | FS          | Disbursement | Message | + |
| 60    | <input type="checkbox"/> | UGRD   | 961110100001 | Conditional Unsubsidized Fed D | 613.00    | 0.00      | AY        | FS          | Disbursement |         | + |

## Example of a message:

### Packaging Message

\*Nbr: 50      Message Number: 9165  
 Item Type: 951100100001      Action: Offer  
 The manual award has been reduced to be consistent with Financial Aid  
 Need target.

[Return](#)

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.

Career:    
 Packaging Plan ID:    
 Repackaging Plan ID:

Package Status:   
 Aggregate Source:    
 Award Period:

Award Notification

| Award |                          | Status |              |                                |           |           |           |             |              |         |   |
|-------|--------------------------|--------|--------------|--------------------------------|-----------|-----------|-----------|-------------|--------------|---------|---|
| *Nbr  | Action                   | Career | Item Type    | Description                    | Offered   | Accepted  | Disb Plan | *Split Code |              |         |   |
| 5     | <input type="checkbox"/> | UGRD   | 941400420000 | Walter A. Haas Scholarship     | 500.00    | 500.00    | AY        | FS          | Disbursement |         | + |
| 10    | <input type="checkbox"/> | UGRD   | 946200100001 | Conditional Federal Pell Grant | 5,165.00  | 5,165.00  | AY        | XX          | Disbursement |         | + |
| 20    | <input type="checkbox"/> | UGRD   | 946100100001 | Conditional Cal Grant A        | 12,294.00 | 12,294.00 | AY        | XX          | Disbursement |         | + |
| 30    | <input type="checkbox"/> | UGRD   | 942102900001 | Conditional UC Undergraduate G | 2,511.00  | 2,511.00  | AY        | FS          | Disbursement |         | + |
| 40    | <input type="checkbox"/> | UGRD   | 961100100001 | Conditional Subsidized Fed Dir | 5,500.00  | 0.00      | AY        | FS          | Disbursement |         | + |
| 50    | <input type="checkbox"/> | UGRD   | 951100100001 | Conditional Work-Study         | 1,083.00  | 0.00      | AY        | FS          | Disbursement | Message | + |
| 60    | <input type="checkbox"/> | UGRD   | 961110100001 | Conditional Unsubsidized Fed D | 613.00    | 0.00      | AY        | FS          | Disbursement |         | + |

You will see a message confirming the Posting process is complete and the student is Packaged.

## Message

Award Posting completed successfully. (14420,61)

Awards were successfully posted. You should verify that all award amounts and disbursements are correct. Make appropriate adjustments as necessary.

OK

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**

The screenshot shows the 'Student Aid Package' interface. The 'Look Up Packaging Plan ID' dialog box is open, displaying search results for 'UG' (Undergraduate). The dialog box includes fields for 'Academic Institution' (UCB01), 'Aid Year' (2017), 'Academic Career' (UGRD), 'Packaging Plan ID' (begins with), and 'Description' (begins with). The search results table shows the following data:

| Packaging Plan ID | Description             |
|-------------------|-------------------------|
| CALDREAM          | Cal Dream               |
| MCAP              | MCAP, Gift Exceeds Need |
| RC_HONOR          | Honorary RC             |
| UG                | Undergraduate           |

Click the **Retrieve** Button.

Student Aid Package




Need Summary

Term Summary

Student: Shandrika

ID:

UCB01






Aid Year: 2017

Federal Aid Year 2016-2017

Institution:

UCB01



Career:

UGRD

Undergrad

Package Status:

Applied

Award Notification

Packaging Plan ID:

UG

Retrieve

Aggregate Source:

Default

Validate

Repackaging Plan ID:

Repackage

Award Period:


Academic


Post


Reset


Award

Status

| Nbr | Action | Career | Item Type | Description | Offered | Accepted | Disb Plan | Split Code |   |
|-----|--------|--------|-----------|-------------|---------|----------|-----------|------------|---|
|     |        | UGRD   |           |             | 0.00    | 0.00     |           |            |  |

 Save

 Return to Search

 Notify

Student Aid Package | Need Summary | Term Summary

Now you can see the Awards assigned to the student Under Awards Tab. The system will show all awards that were evaluated.

Career:

UGRD

Undergrad

Package Status:

Applied

Award Notification

Validate

Packaging Plan ID:

UG

Retrieve

Aggregate Source:

Default

Award Period:

Academic

Repackaging Plan ID:

Repackage

Post

Reset

| Award |        | Status |              |                                 |          |          |           |             |              |         |  |  |  |  |  |  |  |  |  |  |  |
|-------|--------|--------|--------------|---------------------------------|----------|----------|-----------|-------------|--------------|---------|--|--|--|--|--|--|--|--|--|--|--|
| *Nbr  | Action | Career | Item Type    | Description                     | Offered  | Accepted | Disb Plan | *Split Code |              |         |  |  |  |  |  |  |  |  |  |  |  |
| 10    |        | UGRD   | 946200100001 | Conditional Federal Pell Grant  | 5,165.00 | 5,165.00 | AY        | XX          | Disbursement |         |  |  |  |  |  |  |  |  |  |  |  |
| 20    | X      | UGRD   | 946200300001 | Conditional Federal SEOG Grant  | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 30    | X      | UGRD   | 946200100000 | Federal Pell Grant              | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 40    | X      | UGRD   | 946200300000 | Federal SEOG Grant              | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 50    | X      | UGRD   | 942103900000 | Berkeley Middle Class Access P  | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 60    | X      | UGRD   | 942103900001 | Conditional Middle Class Access | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 70    | X      | UGRD   | 946100100002 | Estimated Cal Grant A           | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 80    | X      | UGRD   | 946100100002 | Estimated Cal Grant A           | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 90    |        | UGRD   | 946100100001 | Conditional Cal Grant A         | 6,147.00 | 6,147.00 | AY        | FL          | Disbursement |         |  |  |  |  |  |  |  |  |  |  |  |
| 100   |        | UGRD   | 946100100001 | Conditional Cal Grant A         | 6,147.00 | 6,147.00 | AY        | SP          | Disbursement |         |  |  |  |  |  |  |  |  |  |  |  |
| 110   | X      | UGRD   | 946100200002 | Estimated Cal Grant B           | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 120   | X      | UGRD   | 946100200002 | Estimated Cal Grant B           | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 130   | X      | UGRD   | 946100200001 | Conditional Cal Grant B Fee Aw  | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 140   | X      | UGRD   | 946100200001 | Conditional Cal Grant B Fee Aw  | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 150   | X      | UGRD   | 946100300002 | Estimated Cal Grant B Access    | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 160   | X      | UGRD   | 946100300002 | Estimated Cal Grant B Access    | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 170   | X      | UGRD   | 946100300001 | Conditional Cal Grant B Access  | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 180   | X      | UGRD   | 946100300001 | Conditional Cal Grant B Access  | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 190   | X      | UGRD   | 946100100000 | Cal Grant A Fee Award, Renew    | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 200   | X      | UGRD   | 946100100000 | Cal Grant A Fee Award, Renew    | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 210   | X      | UGRD   | 946110100000 | Cal Grant A Fee, New E          | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 220   | X      | UGRD   | 946110100000 | Cal Grant A Fee, New E          | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 230   | X      | UGRD   | 946120100000 | Cal Grant A Fee, New C          | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 240   | X      | UGRD   | 946120100000 | Cal Grant A Fee, New C          | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 250   | X      | UGRD   | 946100200000 | Cal Grant B Fee Award, Renew    | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 260   | X      | UGRD   | 946100200000 | Cal Grant B Fee Award, Renew    | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 270   | X      | UGRD   | 946110200000 | Cal Grant B Fee, New E          | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 280   | X      | UGRD   | 946110200000 | Cal Grant B Fee, New E          | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 290   | X      | UGRD   | 946120200000 | Cal Grant B Fee Award, New C    | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 300   | X      | UGRD   | 946120200000 | Cal Grant B Fee Award, New C    | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 310   | X      | UGRD   | 946100300000 | Cal Grant B Access, Renew       | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 320   | X      | UGRD   | 946100300000 | Cal Grant B Access, Renew       | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 330   | X      | UGRD   | 946110300000 | Cal Grant B Access, New E       | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 340   | X      | UGRD   | 946110300000 | Cal Grant B Access, New E       | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 350   | X      | UGRD   | 946120300000 | Cal Grant B Access, New C       | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 360   | X      | UGRD   | 946120300000 | Cal Grant B Access, New C       | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 370   | X      | UGRD   | 942103700000 | UC Fee Grant Incentive Awards   | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 380   | X      | UGRD   | 942103700001 | Conditional IAP Fee Grant       | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 390   | X      | UGRD   | 941900010000 | R&C Scholarship                 | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |
| 400   | X      | UGRD   | 941900010001 | Conditional R&C Scholarship     | 0.00     | 0.00     |           |             | Disbursement | Message |  |  |  |  |  |  |  |  |  |  |  |

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.

Career:

UGRD

Undergrad

Packaging Plan ID:

UG

Retrieve

Repackaging Plan ID:

Repackage

Package Status:

Applied

Aggregate Source:

Default

Award Period:

Academic

Award Notification

Validate

Post

Reset

| Award |                                     | Status |              |                                |          |          |           |             |                      |   |
|-------|-------------------------------------|--------|--------------|--------------------------------|----------|----------|-----------|-------------|----------------------|---|
| *Nbr  | Action                              | Career | Item Type    | Description                    | Offered  | Accepted | Disb Plan | *Split Code |                      |   |
| 10    | <input type="checkbox"/>            | UGRD   | 946200100001 | Conditional Federal Pell Grant | 5,165.00 | 5,165.00 | AY        | XX          | Disbursement         | + |
| 20    | <input checked="" type="checkbox"/> | UGRD   | 946200300001 | Conditional Federal SEOG Grant | 0.00     | 0.00     |           |             | Disbursement Message | + |
| 30    | <input checked="" type="checkbox"/> | UGRD   | 946200100000 | Federal Pell Grant             | 0.00     | 0.00     |           |             | Disbursement Message | + |
| 40    | <input checked="" type="checkbox"/> | UGRD   | 946200300000 | Federal SEOG Grant             | 0.00     | 0.00     |           |             | Disbursement Message | + |
| 50    | <input checked="" type="checkbox"/> | UGRD   | 942103900000 | Berkeley Middle Class Access P | 0.00     | 0.00     |           |             | Disbursement Message | + |
| 60    | <input checked="" type="checkbox"/> | UGRD   | 942103900001 | Conditional Middle Class Acces | 0.00     | 0.00     |           |             | Disbursement Message | + |
| 70    | <input checked="" type="checkbox"/> | UGRD   | 946100100002 | Estimated Cal Grant A          | 0.00     | 0.00     |           |             | Disbursement Message | + |
| 80    | <input checked="" type="checkbox"/> | UGRD   | 946100100002 | Estimated Cal Grant A          | 0.00     | 0.00     |           |             | Disbursement Message | + |
| 90    | <input type="checkbox"/>            | UGRD   | 946100100001 | Conditional Cal Grant A        | 6,147.00 | 6,147.00 | AY        | FL          | Disbursement         | + |
| 100   | <input type="checkbox"/>            | UGRD   | 946100100001 | Conditional Cal Grant A        | 6,147.00 | 6,147.00 | AY        | SP          | Disbursement         | + |

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.

Message

Award Validation completed successfully. (14420,58)

Verify that the amounts are correct. Remember to "Post" the awards once you are satisfied with the results.

OK

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.

Career:

UGRD

Undergrad

Packaging Plan ID:

UG

Retrieve

Repackaging Plan ID:

Repackage

Package Status:

Applied

Aggregate Source:

Default

Award Period:

Academic

Award Notification

Validate

Post

Reset

| Award |                          | Status |              |                                |          |          |           |             |              |   |
|-------|--------------------------|--------|--------------|--------------------------------|----------|----------|-----------|-------------|--------------|---|
| *Nbr  | Action                   | Career | Item Type    | Description                    | Offered  | Accepted | Disb Plan | *Split Code |              |   |
| 10    | <input type="checkbox"/> | UGRD   | 946200100001 | Conditional Federal Pell Grant | 5,165.00 | 5,165.00 | AY        | XX          | Disbursement | + |
| 90    | <input type="checkbox"/> | UGRD   | 946100100001 | Conditional Cal Grant A        | 6,147.00 | 6,147.00 | AY        | FL          | Disbursement | + |
| 100   | <input type="checkbox"/> | UGRD   | 946100100001 | Conditional Cal Grant A        | 6,147.00 | 6,147.00 | AY        | SP          | Disbursement | + |
| 580   | <input type="checkbox"/> | UGRD   | 942102900001 | Conditional UC Undergraduate G | 2,511.00 | 2,511.00 | AY        | FS          | Disbursement | + |
| 710   | <input type="checkbox"/> | UGRD   | 961100100001 | Conditional Subsidized Fed Dir | 5,500.00 | 0.00     | AY        | FS          | Disbursement | + |
| 960   | <input type="checkbox"/> | UGRD   | 951100100001 | Conditional Work-Study         | 1,583.00 | 0.00     | AY        | FS          | Disbursement | + |
| 970   | <input type="checkbox"/> | UGRD   | 961110100001 | Conditional Unsubsidized Fed D | 613.00   | 0.00     | AY        | FS          | Disbursement | + |

Save

Return to Search

Notify

Student Aid Package | Need Summary | Term Summary

You will see a message confirming the Posting process is complete and the student is Packaged.

## Message

Award Posting completed successfully. (14420,61)

Awards were successfully posted. You should verify that all award amounts and disbursements are correct. Make appropriate adjustments as necessary.

OK

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**.

The screenshot displays the 'Student Aid Package' tab in a software interface. The main window shows a list of awards with columns for Nbr, Action, Career, Item Type, and Description. A modal window titled 'Look Up Repackaging Plan ID' is open, showing search criteria: Academic Institution (UCB01), Aid Year (2017), Academic Career (UGRD), Repackaging Plan ID (begins with), and Description (begins with). The 'Look Up' button is highlighted. Below the modal, the 'Search Results' section shows a table with two rows: 'FULL' and 'Full Repack of Original Plan'.

| *Nbr | Action | Career | Item Type    | Description                    |
|------|--------|--------|--------------|--------------------------------|
| 10   |        | UGRD   | 941400420000 | Walter A. Haas Scholarship     |
| 20   |        | UGRD   | 946200100001 | Conditional Federal Grant      |
| 30   |        | UGRD   | 946100100001 | Conditional Cal Gra            |
| 40   |        | UGRD   | 942102900001 | Conditional UC Undergraduate G |
| 50   |        | UGRD   | 961100100001 | Conditional Subsid             |
| 60   |        | UGRD   | 951100100001 | Conditional Work-S             |
| 70   |        | UGRD   | 961110100001 | Conditional Unsubs             |

| Repackaging Plan ID | Description                  |
|---------------------|------------------------------|
| FULL                | Full Repack of Original Plan |

Click **Repackage Button**.

**Student Aid Package** | Need Summary | Term Summary

Student, Shandrika  
Aid Year: 2017 Federal Aid Year 2016-2017  
ID: UCB01

Career: UGRD Undergrad  
Packaging Plan ID: UG Retrieve  
Repackaging Plan ID: FULL Repackage

Package Status: Completed  
Aggregate Source: Default  
Award Period: Both

Award Notification  
Validate  
Post Reset

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.

**Student Aid Package** | Need Summary | Term Summary

Student, Shandrika  
Aid Year: 2017 Federal Aid Year 2016-2017  
Career: UGRD  
Packaging Plan ID: UG  
Repackaging Plan ID: FULL

**Message**

Award Validation completed successfully. Please review each award message. (14420,57)

The award amount may have been adjusted as a result of the Validation process.

OK

| *Nbr | Action | Career | Item Type    | Description                    | Offered  | Accepted | Disb Plan | *Split Code |                      |   |
|------|--------|--------|--------------|--------------------------------|----------|----------|-----------|-------------|----------------------|---|
| 10   |        | UGRD   | 941400420000 | Walter A. Haas Scholarship     | 500.00   | 500.00   | AY        | FS          | Disbursement         | + |
| 20   |        | UGRD   | 946200100001 | Conditional Federal Pell Grant | 0.00     | 0.00     | AY        | XX          | Disbursement         | + |
| 30   |        | UGRD   | 946100100001 | Conditional Cal Grant A        | 0.00     | 0.00     | AY        | XX          | Disbursement         | + |
| 40   |        | UGRD   | 942102900001 | Conditional UC Undergraduate G | 0.00     | 0.00     | AY        | FS          | Disbursement         | + |
| 50   |        | UGRD   | 961100100001 | Conditional Subsidized Fed Dir | 0.00     | 0.00     | AY        | FS          | Disbursement         | + |
| 60   |        | UGRD   | 951100100001 | Conditional Work-Study         | 0.00     | 0.00     | AY        | FS          | Disbursement         | + |
| 70   |        | UGRD   | 961110100001 | Conditional Unsubsidized Fed D | 0.00     | 0.00     | AY        | FS          | Disbursement         | + |
| 80   |        | UGRD   | 946200100001 | Conditional Federal Pell Grant | 5,165.00 | 5,165.00 | AY        | XX          | Disbursement         | + |
| 90   | X      | UGRD   | 946200300001 | Conditional Federal SEOG Grant | 0.00     | 0.00     |           |             | Disbursement Message | + |
| 100  | X      | UGRD   | 946200100000 | Federal Pell Grant             | 0.00     | 0.00     |           |             | Disbursement Message | + |
| 110  | X      | UGRD   | 946200300000 | Federal SEOG Grant             | 0.00     | 0.00     |           |             | Disbursement Message | + |
| 120  | X      | UGRD   | 942103900000 | Berkeley Middle Class Access P | 0.00     | 0.00     |           |             | Disbursement Message | + |
| 130  | X      | UGRD   | 942103900001 | Conditional Middle Class Acces | 0.00     | 0.00     |           |             | Disbursement Message | + |

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.








## Packaging Message

**Nbr:** 180 **Message Number:** 9510  
**Item Type:** 946100200002 **Action:** Discard

The student failed to qualify for this Item Type because Selection Criteria, at the Packaging Rule level, was not met.

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

|   |   |                    |  |   |       |
|---|---|--------------------|--|---|-------|
| Student Aid Package                       |   | Need Summary       |  | Term Summary  |       |
| Student, Shandrika                        |   | ID:                |  |    |       |
| Aid Year: 2017 Federal Aid Year 2016-2017 |   | Institution: UCB01 |  |    |       |
| Career:                                   | <input type="text" value="UGRD"/>  Undergrad | Package Status:    | <input type="text" value="Completed"/> | Award Notification  |       |
| Packaging Plan ID:                        | <input type="text" value="UG"/>  Retrieve    | Aggregate Source:  | <input type="text" value="Default"/>   | <b>Validate</b>   |       |
| Repackaging Plan ID:                      | <input type="text" value="FULL"/>  Repackage | Award Period:      | <input type="text" value="Both"/>      | Post  | Reset |

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

### Message

Award Validation completed successfully. (14420,58)

Verify that the amounts are correct. Remember to "Post" the awards once you are satisfied with the results.

OK

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.

Career:  Undergrad  
 Packaging Plan ID:  Retrieve  
 Repackaging Plan ID:  Repackage

Package Status:   
 Aggregate Source:  Validate  
 Award Period:  Post Reset

| Award |                          | Status |              |                                |          |          |           |             |              |   |
|-------|--------------------------|--------|--------------|--------------------------------|----------|----------|-----------|-------------|--------------|---|
| *Nbr  | Action                   | Career | Item Type    | Description                    | Offered  | Accepted | Disb Plan | *Split Code |              |   |
| 10    | <input type="checkbox"/> | UGRD   | 941400420000 | Walter A. Haas Scholarship     | 500.00   | 500.00   | AY        | FS          | Disbursement | + |
| 20    | <input type="checkbox"/> | UGRD   | 946200100001 | Conditional Federal Pell Grant | 0.00     | 0.00     | AY        | XX          | Disbursement | + |
| 30    | <input type="checkbox"/> | UGRD   | 946100100001 | Conditional Cal Grant A        | 0.00     | 0.00     | AY        | XX          | Disbursement | + |
| 40    | <input type="checkbox"/> | UGRD   | 942102900001 | Conditional UC Undergraduate G | 0.00     | 0.00     | AY        | FS          | Disbursement | + |
| 50    | <input type="checkbox"/> | UGRD   | 961100100001 | Conditional Subsidized Fed Dir | 0.00     | 0.00     | AY        | FS          | Disbursement | + |
| 60    | <input type="checkbox"/> | UGRD   | 951100100001 | Conditional Work-Study         | 0.00     | 0.00     | AY        | FS          | Disbursement | + |
| 70    | <input type="checkbox"/> | UGRD   | 961110100001 | Conditional Unsubsidized Fed D | 0.00     | 0.00     | AY        | FS          | Disbursement | + |
| 80    | <input type="checkbox"/> | UGRD   | 946200100001 | Conditional Federal Pell Grant | 5,165.00 | 5,165.00 | AY        | XX          | Disbursement | + |
| 160   | <input type="checkbox"/> | UGRD   | 946100100001 | Conditional Cal Grant A        | 6,147.00 | 6,147.00 | AY        | FL          | Disbursement | + |
| 170   | <input type="checkbox"/> | UGRD   | 946100100001 | Conditional Cal Grant A        | 6,147.00 | 6,147.00 | AY        | SP          | Disbursement | + |
| 650   | <input type="checkbox"/> | UGRD   | 942102900001 | Conditional UC Undergraduate G | 1,644.00 | 1,644.00 | AY        | FS          | Disbursement | + |
| 780   | <input type="checkbox"/> | UGRD   | 961100100001 | Conditional Subsidized Fed Dir | 5,500.00 | 0.00     | AY        | FS          | Disbursement | + |
| 1030  | <input type="checkbox"/> | UGRD   | 951100100001 | Conditional Work-Study         | 3,200.00 | 0.00     | AY        | FS          | Disbursement | + |
| 1040  | <input type="checkbox"/> | UGRD   | 961110100001 | Conditional Unsubsidized Fed D | 613.00   | 0.00     | AY        | FS          | Disbursement | + |

Save Return to Search Notify

Click on the **Post** button to confirm the edits to the package are actually saved and post to the student’s CalCentral Page.

Career:  Undergrad  
 Packaging Plan ID:  Retrieve  
 Repackaging Plan ID:  Repackage

Package Status:   
 Aggregate Source:  Validate  
 Award Period:  **Post** Reset

You will see a Prompt to notify the Posting process is complete and the student is Repackaged.

Student Aid Package

Need Summary

Term Summary

Student,Shandrika  
 Aid Year: 2017 Federal Aid Year 2016-2017  
 Career:   
 Packaging Plan ID:   
 Repackaging Plan ID:

Award Status

| *Nbr | Action                   | Career | Item Type    | Description                    | Offered   | Accepted  | Disb Plan | *Split Code |              |   |
|------|--------------------------|--------|--------------|--------------------------------|-----------|-----------|-----------|-------------|--------------|---|
| 10   | <input type="checkbox"/> | UGRD   | 941400420000 | Walter A. Haas Scholarship     | 500.00    | 500.00    | AY        | FS          | Disbursement | + |
| 80   | <input type="checkbox"/> | UGRD   | 946200100001 | Conditional Federal Pell Grant | 5,165.00  | 5,165.00  | AY        | XX          | Disbursement | + |
| 170  | <input type="checkbox"/> | UGRD   | 946100100001 | Conditional Cal Grant A        | 12,294.00 | 12,294.00 | AY        | XX          | Disbursement | + |
| 650  | <input type="checkbox"/> | UGRD   | 942102900001 | Conditional UC Undergraduate G | 1,644.00  | 1,644.00  | AY        | FS          | Disbursement | + |
| 780  | <input type="checkbox"/> | UGRD   | 961100100001 | Conditional Subsidized Fed Dir | 5,500.00  | 0.00      | AY        | FS          | Disbursement | + |
| 1030 | <input type="checkbox"/> | UGRD   | 951100100001 | Conditional Work-Study         | 3,200.00  | 0.00      | AY        | FS          | Disbursement | + |
| 1040 | <input type="checkbox"/> | UGRD   | 961110100001 | Conditional Unsubsidized Fed D | 613.00    | 0.00      | AY        | FS          | Disbursement | + |

Save Return to Search Notify

Student Aid Package | Need Summary | Term Summary

Message

Award Posting completed successfully. (14420,61)  
  
 Awards were successfully posted. You should verify that all award amounts and disbursements are correct. Make appropriate adjustments as necessary.

OK

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.

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## 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](mailto:sishelp@berkeley.edu)
- Submit a ticket: [https://berkeley.service-now.com/ess/create\\_incident](https://berkeley.service-now.com/ess/create_incident)