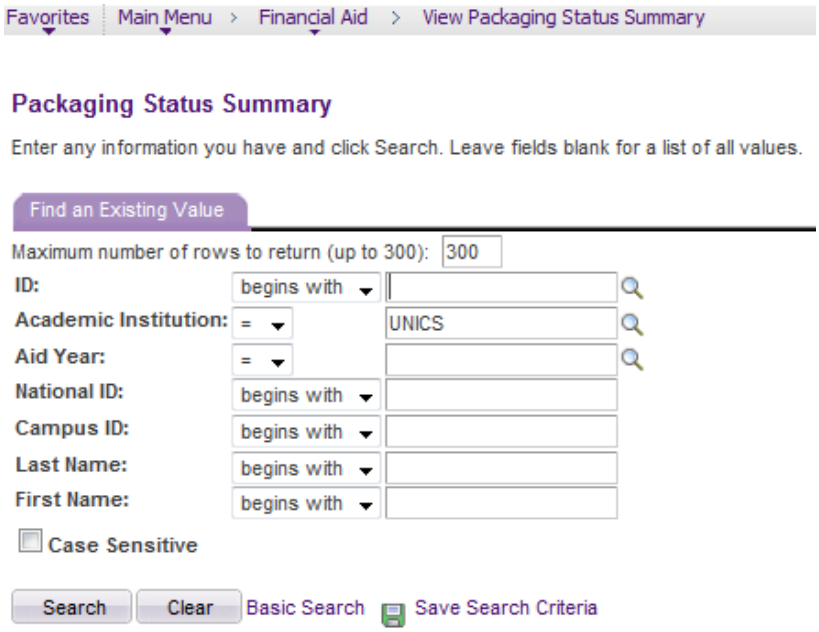
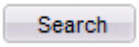
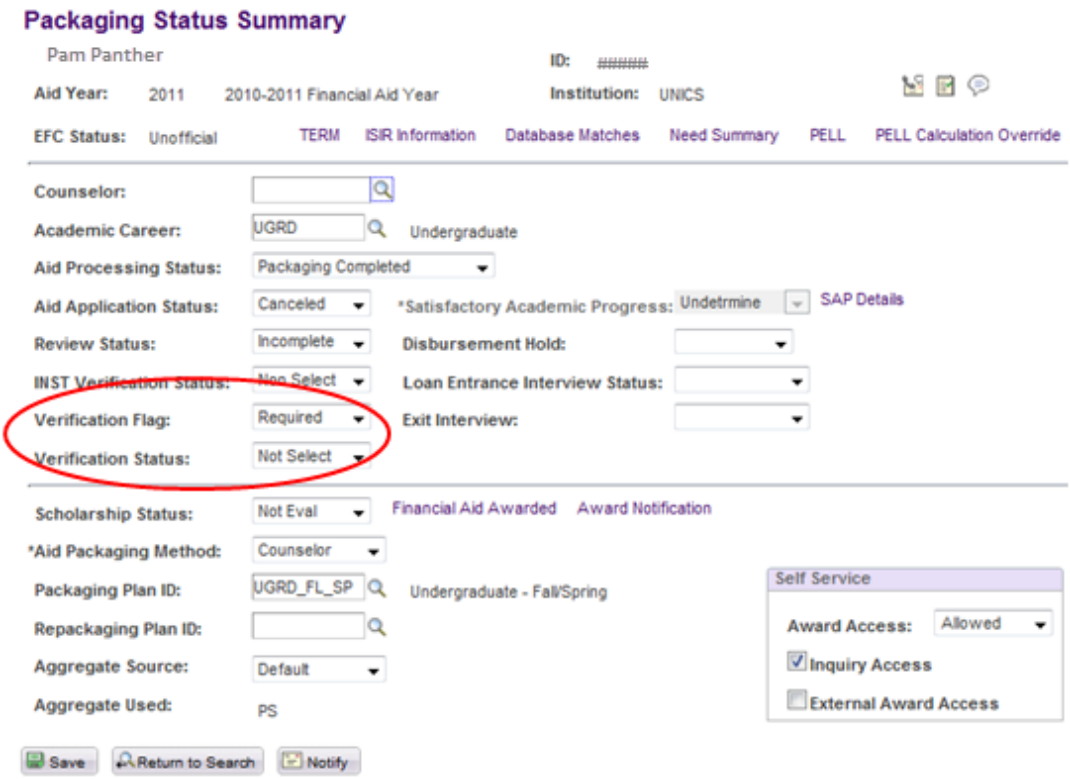
Updating the Packaging Status Summary - Verification Flag/Status

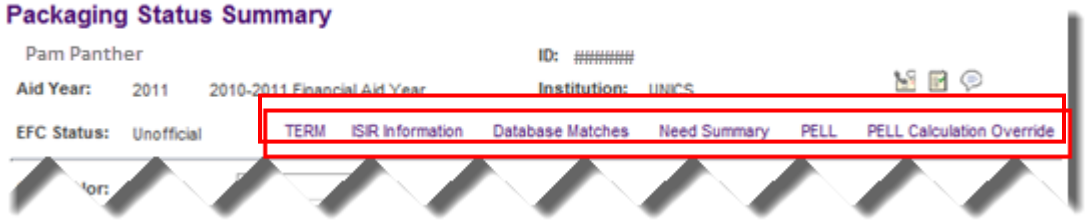
Purpose: The **Packaging Status Summary** page provides a comprehensive summary of the student's financial aid application and award information. This page provides links to access other pages to view ISIR and term information, database matches, student cost of attendance and need, and Pell information. The following table describes how to update the verification flag and verification status fields.

Step	Action
1.	Navigating to the **Packaging Status Summary** page: **Main Menu › Financial Aid › View Packaging Status Summary.** 
2.	Enter the appropriate search criteria.
3.	Click the **Search** button.  ***Result:*** The **Packaging Status Summary** page displays.

Step	Action
4.	Update the **Verification Flag** and **Verification Status** fields.  **<u>Verification Flag</u>** – Select *Complete* once verification has been done. • **Complete:** Indicates that you have completed verification either manually or by the Auto Verification process. • **Not Reqd (not required):** The student has not been selected for verification by the Department of Education. This is the default value for this field. • **Pending:** The student has failed Auto Verification. This value is automatically populated by the Auto Verification process. • **Required:** The student has been selected for verification. This value is automatically populated when you load the student's ISIR data.

Step	Action
5.	**Verification Status** – Select the appropriate value. • **Accurate:** Indicates that the ISIR transaction number is 01, meaning the ISIR information is accurate and no changes are needed. Auto verification enters this value, but you can enter it manually. • **Calculated:** Indicates that you have calculated the Pell eligibility based on ISIR corrections, and the Pell eligibility has not changed. • **Not Select:** The student was not selected for verification. • **Not Verfd (not verified):** Indicates that a student was selected for verification but was not verified. • **Reprocess:** Indicates the SAR needs to be sent for corrections, and is used for all ISIR transaction numbers that are not 01. • **Tolerance:** Indicates that a student's verification passed within the tolerance level. • **Wtht Doc (without documentation):** Indicates that the first Pell payment was made to the student before verification was completed.
6.	Click the **Save** button. Save

Viewing Additional Pages



The table below describes the content on the additional page links at the top of the **Packaging Status Summary** page.

Page Link	Content
TERM	Displays student's financial aid term information.
ISIR Information	Displays some of the student's ISIR information (high-level).
Database Matches	Displays the student's status for the U.S.E.D. required database matches.
Need Summary	Displays the student's need summary information calculated using both Federal and Institutional methods. Note: We use the Federal calculation.
PELL	Displays information related to the student's Pell Grant (if applicable).
PELL Calculation Override	Used to override institutional Pell eligibility calculation setup for a student.

Packaging Status Summary Fields

Field	Description
EFC Status	**EFC Status** represents data from the financial aid application. The status can be *Official, Rejected, or Unofficial*.
Counselor	Enter a financial aid counselor's ID in this field if a particular counselor is assigned to the student.
Academic Career	Select the active career for the student to be used for packaging at this time. This value is automatically populated after the student has been packaged. Values: *Undergraduate, Graduate*
Aid Processing Status	Indicates where the student is in the Awarding process. This status can also be updated in the *Package Status* field on the award entry pages. **Values:** • **Applied -** The student has applied for financial aid. This value is automatically populated when you load a financial aid application like an ISIR, a PROFILE application, or an institutional application. • **No Electronic Application** - No electronic application has been received. • **Packaging Completed** - The student's award package has been posted. The Posting routine automatically updates the field to this value. To repackage a student after their status has been changed to Packaging Completed, use Manual or Auto Packaging or set up a Mass Packaging query definition to select students with a status of Packaging Completed. • **Ready for Counselor Review** - The student should be or is currently being reviewed by a financial aid counselor. • **Ready for Packaging -** The student is ready for packaging. When you select students for Mass Packaging, you may want to choose only students whose status is set to this value; otherwise, any student who meets the Mass Packaging query definition is selected regardless of aid processing status. • **Repackage** - The student is ready for repackaging. Can be set by the External Award Load process.
Aid Application Status	Indicates whether the student's financial aid application is available for financial aid processing. **Values:** • **(none) -** You have not assigned the student's financial aid application a status. You cannot access certain pages until you enter a status. • **Active** - The student's financial aid application is active for financial aid processing. The system assigns this value automatically when you load the student's first ISIR into the system. • **Canceled** - You have canceled the student's financial aid application. You must enter this value manually. • **Restricted** - The student has applied for restricted aid only. You must enter this value manually.

Field	Description
Review Status	Indicate the status of the review of the student's financial aid application. **Values:** • **(none) -** Indicates that your institution does not conduct a review. • **Complete -** The review of this application has been completed. • **Incomplete** - This application is awaiting a review.
INST Verification Status	Indicates the status of the verification process of the student's financial aid application. **Values:** • **(none)** – Indicates that UNI does not conduct verification • **Doc Select** - The student has been selected for institution verification of a document only. • **Non Select** - The student has not been selected for institutional verification.
Verification Flag	Indicates the status of the Department of Education's verification requirement for this student. **Values** • **(none)** - This value is treated the same as the Not Reqd value. • **Complete** - Indicates that you have completed verification. • **Not Reqd (not required)** - The student has not been selected for verification by the Department of Education. This is the default. • **Pending** - The student has failed Auto Verification. This value is automatically populated by the Auto Verification process. • **Required** - The student has been selected for verification. This value is automatically populated when you load the student's ISIR data.
Verification Status	This is associated with the awarding of federal funds, including Pell Grants, Stafford loans, and Direct Loans. It indicates the code you use when reporting a Pell payment made to a student. **Values** • **Accurate -** Indicates that the ISIR transaction number is 01, meaning the ISIR information is accurate and no changes are needed. Auto verification enters this value, but you can enter it manually. • **Calculated -** Indicates that you have calculated the Pell eligibility based on ISIR corrections, and the Pell eligibility has not changed. • **Not Select -** The student was not selected for verification. • **Not Verfd (not verified)** - Indicates that a student was selected for verification but was not verified. • **Reprocess -** Indicates the SAR needs to be sent for corrections, and is used for all ISIR transaction numbers that are not 01. • **Tolerance** - Indicates that a student's verification passed within the tolerance level. • **Wtht Doc (without documentation) -** Indicates that the first Pell payment was made to the student before verification was completed. You can only use this value for one Pell payment.

Field	Description
Satisfactory Academic Progress	Indicates whether the student is meeting satisfactory academic progress (SAP). **Values:** • **Meets SAP** - The student is meeting satisfactory academic progress. This value allows federal awards to be made, the student's award to be authorized, and does not cause a hold to be placed on the student's CommonLine loan. • **Not Meet -** The student is not meeting SAP. Federal awards are not made, a student's award is not authorized, and a hold is placed on the student's CommonLine loan when this value is selected. • **Probation** - A student's award is authorized and no hold is placed on the student's CommonLine loan when this value is selected. • **Undetrmine (undetermined) -** SAP is undetermined or has not been calculated. Federal awards are not made, a student's award is not authorized, and a hold is placed on the student's CommonLine loan when this value is selected.
Disbursement Hold	Enables you to place a hold on the student's awards that is specific to disbursement processing. **Values:** • **(none) -** No holds are placed on this student's financial aid. • **Fed Aid (federal aid) -** Places a hold on the authorization/disbursement of federal aid only. • **Institut. (institutional):** Places a hold on the authorization/disbursement of institutional aid only. • **Loan Hold -** Places a hold on the authorization/disbursement of loans.
Loan Entrance Interview Status	Indicates whether the student has completed a loan entrance interview for the corresponding aid year. **Values:** • **(blank)** – The authorization process automatically determines whether the student has satisfied the loan entrance counseling requirement using the process activated when the Loan Entrance Intervw Req checkbox is selected. • **Complete -** The student has completed a loan entrance interview. If the Loan Entrance Intervw Req check box is selected, the authorization process passes the student and allows the award to be authorized. Set this value after confirmation of the student's completion of loan entrance counseling. • **Inst Req (institution required) -** A loan entrance interview is required, regardless of whether the authorization process requires an interview for loan awards. If the Loan Entrance Intervw Req check box is selected, the authorization process fails until you reset the status to Complete or Pending. Students with prior loan history also fail authorization until you reset the status to blank, Complete, or Pending. • **Pending -** The student's loan entrance interview is pending. If the Loan Entrance Intervw Req check box is selected, the authorization process passes the student and allows the award to be authorized.

Field	Description
Exit Interview	Indicates whether the student has completed a loan exit interview for the corresponding aid year. This field is for informational use only because no delivered process currently uses the value of this field. Values: (*Complete, Inst. Req –institution required, Pending*).
Scholarship Status	Not used at UNI.
Aid Packaging Method	The method used to create the student's financial aid package. The values in this field are automatically updated. • **Auto** - Packaged using Mass Packaging. View the packaging plan used to package the student in the Packaging Plan ID field. • **Counselor** - A financial aid counselor packages the student • **Not Pkgd (not packaged) -** Not yet packaged. This is the default value until you manually change it.
Packaging Plan ID	If Auto Packaging or Mass Packaging is used to package the student, this field identifies the packaging plan used to package the student.
Repacking Plan ID	If Auto Repackaging or Repackaging is used, this field identifies the repackaging plan used.
Aggregate Source	Identifies and defines the aggregate source that the Awarding and Packaging process uses directly. **Values:** • **Default -** Identifies aggregate source to be used based on value defined on FA Installation Defaults. • **NSLDS -** Indicates that awarding and packaging uses the NSLDS aggregate totals. • **PS -** Indicates that awarding and packaging uses the PeopleSoft generated and maintained aggregate totals.
Aggregate Used	Indicates the aggregate source used during packaging. Values are *NSLDS* or *PS.*
Award Access	Displays the result of how you set up the Self-Service Access page. Values are *Allowed* or *Denied*.
Inquiry Access	Select to allow a student to view assigned financial aid awards.
External Award Access	Select to allow a student to report awards from other sources.