

Aggregate Aid Limit Setup for 8 SP1

To support the H.R. 5715 legislation for additional unsubsidized Stafford loan limits for undergraduate students, you must specify the following to your Aggregate Aid Limits defined as *Unsubsidized*. For Aid Year 2008 or later, if the **Aggregate Program** value is *FSTF* or *DSTF*, then the:

- **Source** value is *Federal*.
- **Financial Aid Type** value is *Loan*.
- **Loan Interest Attribute** value is *Unsub*.

Based on these values, the following will occur.

For **Lifetime Limit** fields:

1. The previously existing **Undergrad Lifetime** field is now the **Indep Undergrad Lifetime** field. This field supports the Independent Undergraduate Lifetime Limit for Unsubsidized loans.
2. The new **Dep Undergrad Lifetime** field supports the Dependent Undergraduate Lifetime Limit for Unsubsidized loans.

For **Annual Level Limit** fields:

1. The previously existing **Aggregate Limit** field is now the **Independent Annual Limit** field. This field supports the Independent Undergraduate Annual Aggregate Level Limit for Unsubsidized loans.
2. The new **Dependent Annual Limit** field supports the Dependent Undergraduate Annual Aggregate Level Limit for Unsubsidized loans.

Once you populate these fields, the packaging and repacking routines (manual, auto, and batch) will award undergraduate students according to their dependency limits.

See Student Processing Examples

Page with Aggregate Aid Limit Setup Critical Changes

Page Name	Object Name	Navigation	Usage
Aggregate Aid Limit	AGGR_AID_TBL	Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Aid Limits	Create aggregate aid limits for annual and lifetime limits to meet your business processing rules.

Creating Aggregate Aid Limits

Access the Aggregate Aid Limit page.

PeopleSoft. Home Worklist

Aggregate Aid Limit

Aggregate Area: UNSUB Aid Year: 2008 Federal Aid Year 2007 - 2008 Copy

First 1 of 1 Last

*Effective Date: 01/01/1900 Status: Active
 *Description: FFELP - Unsubsidized Loan
 Long Description: FFELP Stafford Unsubsidized Loan
 *Source: Federal
 Federal ID: Unsubsidzd
 *Financial Aid Type: Loan
 Loan Program: FFELP
 Loan Interest Attribute: Unsub
 Max Terms:

Aggregate Program: FSTF Stafford FFELP Loan
 Indep Undergrad Lifetime: \$57,500
 Graduate Lifetime: \$138,500
 Dep Undergrad Lifetime: \$31,000

Grad Limit Rule
 Cumulative Distinct

Level Limits		Independent Annual Limit	Dependent Annual Limit	Cumulative	Max Terms
G1	Graduate 1st Year	\$20,500	\$0	\$20,500	<input type="checkbox"/>
G2	Graduate 2nd Year	\$20,500	\$0	\$20,500	<input type="checkbox"/>
G3	Graduate 3rd Year	\$20,500	\$0	\$20,500	<input type="checkbox"/>
G4	Graduate 4th Year	\$20,500	\$0	\$20,500	<input type="checkbox"/>
P1	Professional Students	\$20,500	\$0	\$20,500	<input type="checkbox"/>
U0	Undergraduate Freshman - Never	\$9,500	\$5,500	\$9,500	<input type="checkbox"/>
U1	Undergraduate Freshman	\$9,500	\$5,500	\$9,500	<input type="checkbox"/>
U2	Undergraduate Sophomore	\$10,500	\$6,500	\$10,500	<input type="checkbox"/>
U3	Undergraduate Junior	\$12,500	\$7,500	\$12,500	<input type="checkbox"/>
U4	Undergraduate Senior	\$12,500	\$7,500	\$12,500	<input type="checkbox"/>
U5	Undergraduate Senior, 5th Year	\$12,500	\$7,500	\$12,500	<input type="checkbox"/>

Save Return to Search Next in List Previous in List Add Update/Display Include History Connect History

Aggregate Aid Limit page

Student Processing Examples

Example 1: Dependent, First Year Undergraduate, packaging mode = Auto Packaging

1. Originally, this student was auto packaged with the FEDERAL packaging plan and was awarded a 3,500 USD subsidized loan, and no unsubsidized loan.

Student Aid Package **Need Summary** Term Summary

Anthony, George D ID: FAPK0186
 Aid Year: 2008 Federal Aid Year 2007 - 2008 Institution: PSUNV

Career: UGRD Undergraduate Package Status: Completed Validate Post
 Award Period: Both Packaging Plan ID: FEDERAL Retrieve Reset

[Award Notification](#)

Student Aid Package

Award Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code
10	<input type="checkbox"/>	UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01 Disbursement +
20	<input type="checkbox"/>	UGRD	900000000200	Federal Work-Study Program	2,000.00	2,000.00	01	01 Disbursement +
30	<input type="checkbox"/>	UGRD	900000000304	Sub Staff - Sem	3,500.00	3,500.00	01	01 Disbursement +

- The student is now repackaged in auto packaging mode with the FEDERAL packaging plan. The system awarded the student a 2,000 USD additional unsubsidized loan at Sequence **80**.

Student Aid Package **Need Summary** Term Summary

Anthony, George D ID: FAPK0186
 Aid Year: 2008 Federal Aid Year 2007 - 2008 Institution: PSUNV

Career: UGRD Undergraduate Package Status: Completed Validate Post
 Award Period: Both Packaging Plan ID: FEDERAL Retrieve Reset

[Award Notification](#)

Student Aid Package

Award Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code
40	<input type="checkbox"/>	UGRD	900000000100	Federal Pell Grant	4,310.00	4,310.00	01	XX Disbursement +
50	<input type="checkbox"/>	UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01 Disbursement +
60	<input type="checkbox"/>	UGRD	900000000200	Federal Work-Study Program	2,000.00	2,000.00	01	01 Disbursement +
70	<input type="checkbox"/>	UGRD	900000000304	Sub Staff - Sem	3,500.00	3,500.00	01	XX Disbursement +
80	<input type="checkbox"/>	UGRD	900000000305	Unsub Staff Sem	2,000.00	2,000.00	01	01 Disbursement +

Example 2: Independent, Third Year Undergraduate, Packaging mode = manual

- Originally, the student was auto packaged with the FEDERAL packaging plan and was awarded 5,500 USD subsidized loan (Sequence **40**) and 5,000 USD unsubsidized loan (Sequence **50**).

Student Aid Package | Need Summary | Term Summary

Caine, Laura K ID: FAPK0191
 Aid Year: 2008 Federal Aid Year 2007 - 2008 Institution: PSUNV

Career: UGRD Undergraduate Package Status: Completed Validate Post
 Award Period: Both Packaging Plan ID: FEDERAL Retrieve Reset

[Award Notification](#)

Student Aid Package

Award | Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code
10	<input type="checkbox"/>	UGRD	900000000100	Federal Pell Grant	1,360.00	1,360.00	01	XX Disbursement +
20	<input type="checkbox"/>	UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01 Disbursement +
30	<input type="checkbox"/>	UGRD	900000000200	Federal Work-Study Program	2,000.00	2,000.00	01	01 Disbursement +
40	<input type="checkbox"/>	UGRD	900000000304	Sub Staff - Sem	5,500.00	5,500.00	01	01 Disbursement +
50	<input type="checkbox"/>	UGRD	900000000305	Unsub Staff Sem	5,000.00	5,000.00	01	01 Disbursement +

- The student is now repackaged manually by inserting a new row at Sequence 60, specifying the Unsubsidized FA Item Type with 0.00 USD in the **Offered** and **Accepted** fields so that the system can award the maximum eligibility, and clicking the **Validate** button. The system awarded the student a 2,000 USD additional unsubsidized loan at Sequence **60**.

Student Aid Package | Need Summary | Term Summary

Caine, Laura K ID: FAPK0191
 Aid Year: 2008 Federal Aid Year 2007 - 2008 Institution: PSUNV

Career: UGRD Undergraduate Package Status: Completed Validate Post
 Award Period: Both Packaging Plan ID: FEDERAL Retrieve Reset

[Award Notification](#)




Student Aid Package



Award | Status

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code
10	<input type="checkbox"/>	UGRD	900000000100	Federal Pell Grant	1,360.00	1,360.00	01	XX Disbursement +
20	<input type="checkbox"/>	UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01 Disbursement +
30	<input type="checkbox"/>	UGRD	900000000200	Federal Work-Study Program	2,000.00	2,000.00	01	01 Disbursement +
40	<input type="checkbox"/>	UGRD	900000000304	Sub Staff - Sem	5,500.00	5,500.00	01	01 Disbursement +
50	<input type="checkbox"/>	UGRD	900000000305	Unsub Staff Sem	5,000.00	5,000.00	01	01 Disbursement +
60	<input type="checkbox"/>	UGRD	900000000305	Unsub Staff Sem	2,000.00	2,000.00	01	01 Disbursement +

- When you click the **Post** button, the system combines the two instances of the unsubsidized loan into a single instance at Sequence **60** for 7,000 USD.

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






Caine, Laura K **ID:** FAPK0191   
Aid Year: 2008 Federal Aid Year 2007 - 2008 **Institution:** PSUNV

Career:  Undergraduate **Package Status:**
Award Period: **Packaging Plan ID:** 

[Award Notification](#)

Student Aid Package

[Award](#) | [Status](#)

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10	<input type="checkbox"/>	UGRD	900000000100	Federal Pell Grant	1,360.00	1,360.00	01	XX	 Disbursement <input type="button" value="+"/>
20	<input type="checkbox"/>	UGRD	900000000105	Federal SEOG Grant	4,000.00	4,000.00	01	01	 Disbursement <input type="button" value="+"/>
30	<input type="checkbox"/>	UGRD	900000000200	Federal Work-Study Program	2,000.00	2,000.00	01	01	 Disbursement <input type="button" value="+"/>
40	<input type="checkbox"/>	UGRD	900000000304	Sub Staff - Sem	5,500.00	5,500.00	01	01	 Disbursement <input type="button" value="+"/>
60	<input type="checkbox"/>	UGRD	900000000305	Unsub Staff Sem	7,000.00	7,000.00	01	01	 Disbursement <input type="button" value="+"/>