

# PHEAA TRAINING

**PASFAA – Fall 2013**

**Partner Interface - Updates**

Pennsylvania State Grant Program

# Today's Session

## Update for Current Users

- Highlight new features
- Review upgrades
- Planned resources updates
  - ★ New and revised tutorials
  - ★ Revised User Guide
  - ★ Revised Q&A

# Sign In and Search

The screenshot shows a web browser window titled "Partner Interface Training - PHEAA - Windows Internet Explorer". The page content includes a search bar with "Student" entered and a "Search" button. Below the search bar is the Alec logo and the tagline "THE FINANCIAL AID KNOW-IT-ALL". A navigation menu contains "Home", "Financial Aid Services", "File Transfer", "State Grants & Special Programs", and "Loan Processin". The main heading is "Search Results for: Student". A dropdown menu is open, listing various academic periods from "All Periods" to "2009 Summer". A callout box with an orange border points to the dropdown menu and contains the text "Narrow down results by academic year or period". Below the dropdown is a table with columns for "Student Name", "D/O/B", and "Address". The table contains two rows of data. At the bottom of the browser window, a media player shows a play button, a volume icon, a progress bar at 02:00, and a refresh button.

Partner Interface Training - PHEAA - Windows Internet Explorer

Sign In and Search Partner Interface Training

No Audio Available

Student

**Alec**  
THE FINANCIAL AID KNOW-IT-ALL

Home | Financial Aid Services | File Transfer | State Grants & Special Programs ▼ | Loan Processin

Search Results for: Student

All Periods  Dis

All Periods

2013 Summer

2012-2013 Academic

2012 Summer

2011-2012 Academic

2011 Summer

2010-2011 Academic

2010 Summer

2009-2010 Academic

2009 Summer

Narrow down results by academic year or period

Student Name	D/O/B	Address
NT , ITA C	001010015	7456424149 1200 N STREE
NT , MIN W	001010011	7180833729 1200 N STREE

02:00

- Delivers to year/period selected

# Dashboard and Student Listings

Record Status	Total Records	Updates By	9/10 - 9/16	9/17 - 9/23	9/24	9/25	9/26	9/27	9/28	9/29	TODAY 9/30
<b>COMPLETE - ACTIVE</b> Eligibility has been determined for these records. Some of the terms may include need based rejects.	30	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	1	28	1	1	1	0	0	0	0
		<b>Total</b>	1	28	1	1	1	0	0	0	0
<b>INCOMPLETE - ACTIVE</b> These records are missing information or are under review. Some of the terms may include rejects for 'High EFC'.	297	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	296	0	0	1	0	0	0	0
		<b>Total</b>	0	296	0	0	1	0	0	0	0
<b>COMPLETE - REJECT</b> These records include non-need rejects for some of the terms.	3	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	3	0	0	0	0	0	0	0
		<b>Total</b>	0	3	0	0	0	0	0	0	0

- Access to ALL RECORDS (not just recent updates)
- Instant Refresh

<b>INCOMPLETE - REJECT</b> These records include non-need rejects for some of the terms and are missing information or under review.		School	0	0	0	0	0	0	0	0	0
<b>ALL RECORDS</b> Includes complete and incomplete records for Active, Reject and Inactive statuses	351	PHEAA/Students	1	346	1	1	2	0	0	0	0
		<b>Total</b>	1	346	1	1	2	0	0	0	0
		▲ HIDE OTHER STATUSES									

<b>COMPLETE - INACTIVE</b> These records have been declared Inactive by PHEAA.		School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	1	346	1	1	2	0	0	0	0
		<b>Total</b>	1	346	1	1	2	0	0	0	0



# Dashboard and Student Listings

## TOTAL RECORDS IN EACH STATUS OPTIONS:

Record Status	Total Records	Updates By	9
<b>COMPLETE - ACTIVE</b> Eligibility has been determined for these records. Some of the terms may include need based rejects.	<b>30</b>	School PHEAA/Students	
<b>INCOMPLETE - ACTIVE</b> These records are missing information or are under review. Some of the terms		<a href="#">View Records List</a> <a href="#">Process Records Individually</a> <a href="#">Export Records List</a>	

# Dashboard and Student Listings

## 'ALL RECORDS' - 2 OPTIONS

<b>ALL RECORDS</b> Includes complete and incomplete records for Active, Reject and Inactive statuses	<b>351</b>	School	
		PHEAA/Students	
<b>▲ HIDE OTHER STATUSES</b>	<a href="#">View Records List</a>		
	<a href="#">Export Records List</a>		

- Size Limitations
  - ★ Cannot Process Records Individually in 'All'
  - ★ May be forced to Filter Lists

# View Records List

## Filter

TOTAL RECORDS ▾

COMPLETE - ACTIVE 30

INCOMPLETE - ACTIVE 297

COMPLETE - REJECT 3

INCOMPLETE - REJECT 21

COMPLETE - INACTIVE 0

INCOMPLETE - INACTIVE 0

ALL RECORDS 351

### Filter Records Hide Filters

Record Level Filters

Special Conditions:

Term Level Filters  Fall  Winter  Spring  Any

**?** Eligibility Date: From:  To:

Eligibility Status:  Credit Info:  Housing Status:

Enrollment Status:

Cancellation Reasons:

Program of Study:

Results: **30 Records**

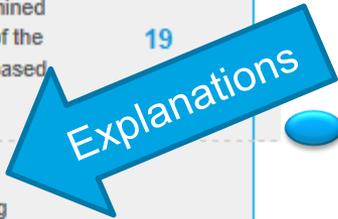
Displaying 1 - 20 out of 30 Student Records

- Reasons to filter:
  - ★ Required to filter (size limit/threshold)
  - ★ Narrow down list for specific criteria

# View Records List Filter

## RECORD STATUS

Record Status	Total Records
<b>Complete - Active</b> Eligibility has been determined for these records. Some of the terms may include need based rejects.	19
<b>Incomplete - Active</b> These records are missing information or are under review. Some of the terms may include rejects for 'High EFC'.	1
<b>Complete - Reject</b> These records include non-need rejects for some of the terms.	2
<b>Incomplete - Reject</b> These records include non-need rejects for some of the terms and are missing information or under review.	1



● Be aware of what can be included in each status

● Status is Record (not term) Level - *Examples*

★ **Complete-Active** – Records include those that have been awarded, rejected for a ‘Need’ reason (E, M, or Y), cancelled, or adjusted to zero (which results in Reject M).

★ **Complete-Reject** – Records may be non-need reject for one term/awarded for another

# View Records List Filter

## Filter Records

Record Level Filters

Special Conditions:  

Term Level Filters

Collectibles  
Validation Processing  
Late Processing

ring  Any

- Record Level - Complete and 'All' Categories ONLY
- Special Conditions
  - ★ PHEAA Collectables
  - ★ Validation
  - ★ Late Processing – PHEAA special deadline extensions (NOT Reject L's)

# View Records List Filter

## RECORD LEVEL – ALL RECORDS

State Grant Records

2013-2014 ACADEMIC  period for: 99999997 PHEAA QUARTER UNIVERSITY

TOTAL RECORDS

Complete - Active 19  
Incomplete - Active 1  
Complete - Reject 2  
Incomplete - Reject 1  
Complete - Inactive 0  
Incomplete - Inactive 0

All Records 23

Filter Records

Hide Filters

Record Level Filters

Record Status:  Complete - Active  Incomplete - Active  Incomplete - Reject  
 Complete - Reject  Complete - Inactive  Incomplete - Inactive

Special Conditions:

Term Level Filters  Fall  Winter  Spring  Any

Eligibility Date: From:  To:

Distance Education Program:

Eligibility Status:  Credit Info:  Housing Status:

Enrollment Status:

Full Time Student  
Full Time-Evening  
Half-time Student  
Attending less Than Half-Time

Cancellation Reasons:

Graduated from a Bachelor's Deg  
Not a High School Graduate  
Death of Student  
Cancelled due to Agency Error

Program of Study:

5 Year Co-op Work-Study (All Ma  
Bachelor's Degree (Religion Majc  
Bachelor's Degree (All Other Maj  
2 Year Terminal Proq in a 4 Year

Results: 23 Records

Reset Filters

Apply Filters

# View Records List Filter

## Student Information

Address: 1200 North 7th Street Harrisburg, PA 17102 Phone: (717) 555-1212 Email: student@pheaa.org H.S. Graduation: 20

## Grant Information

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	
Award Date:	09/09/2013	09/09/2013	09/09/2013	
Housing Status:	Commuter	Commuter	Commuter	
Enrollment Status:	Full Time Student	Full Time Student	Full Time Student	
Award/Reject:	Pending	Pending	Pending	
Alternate Award (AA)	Pending	Pending	Pending	
Enrollment Status for AA:	Part-Time	Part-Time	Part-Time	
Remedial Exception:				0.0
Award Counters:	0	0	0	0

● Pending

★ Can appear in any Record Status upon Filter

★ Record may not appear when drilling down with term level filters

# Filter

## STEP 1: ADD FILTERS

### Filter Records

No filters have been applied. [Add Filters.](#)

Displaying 1 - 20 out of 281 Student Records

Export to Excel/CSV

Go to First Record >



Records Selected (0)

Add to New Mass Update

# Filter

## STEP 2: SELECT CRITERIA

### ● Term Level

Filter Records [Hide Filters](#)

Term Level Filters  Fall  Winter  Spring  Any

Eligibility Date: From:  To:  Distance Education Program:

Eligibility Status:  Credit Info:  Housing Status:

Enrollment Status:   
Full Time-Evening  
Half-time Student  
Attending less Than Half-Time

Cancellation Reasons:   
Student Not Enrolled  
Income or Asset Review  
Less than 50% Classroom Attend

Program of Study:   
Bachelor's Degree (Religion Majc  
Bachelor's Degree (All Other Maj  
2 Year Terminal Prog in a 4 Year

Results: **19 Records**

Displaying 1 - 19 out of 19 Student Records

- ★ Eligibility Date
- ★ Eligibility Status
- ★ Credit Info
- ★ Housing
- ★ Enrollment
- ★ Cancellation
- ★ Program of Study
- ★ SGDEPP **PHeaa**

# Filter

Close 

## Eligibility Date

The date when eligibility (award or reject) was determined or the date an award was cancelled or adjusted.

Winter  Spring  Any



Eligibility Date

From:

mm/dd/yyyy

To:

mm/dd/yyyy

## Eligibility Date Range

- Date Eligibility Determined (Award or Reject); or
- Date Award Cancelled; or
- Date Award Adjusted

# Filter

## STEP 3: APPLY OR RESET FILTERS

Filter Records Hide Filters

Term Level Filters  Fall  Winter  Spring  Any

**?** Eligibility Date: From:  To:  Distance Education Program:

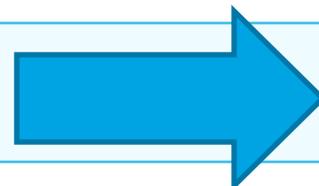
Eligibility Status:  Credit Info:  Housing Status:

**Enrollment Status:**  
Full Time Student   
Full Time-Evening   
Half-time Student   
Attending less Than Half-Time

**Cancellation Reasons:**  
Cancelled due to Agency Error   
Student Not Enrolled   
Income or Asset Review   
Less than 50% Classroom Attend

**Program of Study:**  
5 Year Co-op Work-Study (All Ma   
Bachelor's Degree (Religion Majc   
Bachelor's Degree (All Other Maj   
2 Year Terminal Prog in a 4 Year

**Results: 19 Records**



## STEP 4: USE YOUR RESULTS

### Options after you filter...

- Export to Excel/CSV
- Cycle Through Records
- Select Records and Create Mass Update Queue

# After Filter – Option 1

## Export to Excel or CSV file

### STEP 1: SELECT EXPORT

- Greater Detail in Exported Information

2 - Full Time-Evening  
3 - Half-time Student  
4 - Less Than Half-Time

D - Not a High School Graduate  
D - Death of Student  
E - Cancelled due to Agency Error

D - Bachelor's Degree (Religion)  
C - Bachelor's Degree (All Other)  
F - 5 Yr Bona Fide Program

Reset Filters Apply Filters

Displaying 1 - 20 out of 258 Student Records

Export to Excel/CSV Go to First Record >

Records Selected (0) Add to New Mass Update

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
<input type="checkbox"/> JILCOX, LINDA R 119 BUMBLE BEE DR MECHANICSBURG, PA 17055	555030145	1	\$1,970 Full Time Student Dormitory		\$1,970 Full Time Student Dormitory	\$3,940

# After Filter - Option 1

## Export to Excel or CSV file

### IMPORTANT!

- Exports ALL on list displayed
- ★ Filter if you want to narrow list
- Selection boxes are for Mass Update only

	Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
<input type="checkbox"/>	STUDENT, ABABUO C 1200 NORTH 7TH STREET HARRISBURG, PA 17102						
<input type="checkbox"/>	STUDENT, JAMES I 1200 NORTH 7TH STREET HARRISBURG, PA 17102	001010253	0	Pending Full Time Student Commuter	Pending Full Time Student Commuter	Pending Full Time Student Commuter	
<input type="checkbox"/>	STUDENT, LABAN X 1200 NORTH 7TH STREET HARRISBURG, PA 17102	001010253	0	Rejected-P Full Time Student Dormitory	Rejected-P Full Time Student Dormitory	Rejected-P Full Time Student Dormitory	

Check Boxes for Mass Update ONLY!

# After Filter - Option 1

## Export to Excel or CSV file

### STEP 2: NAME AND CHOOSE FORMAT

● Choose:

- ★ Excel for full descriptions; not using for automated processing
- ★ CSV for automated processing

**Export Student Records** Close

Name:   
Name cannot exceed 30 characters (including spaces). Special characters and numbers are allowed except first position.

Description:   
Maximum of 255 characters (including spaces).

Format:  ▼  
Excel - List will be exported with descriptions instead of codes. This will be similar to the Student Records List.  
CSV - List will be exported with codes in the Grant Applicant Status Transmission format. This file can be imported into your FAMS system.

Displaying 1 - 19 out of 19 Student Records Export to Excel/CSV Go to First Record >

# After Filter - Option 1

## Export to Excel or CSV file

### EXAMPLES

Excel- Settings tab; Tab with Data in English

School Code

SSN

Name

Address

Award Counter (Total)

(Fall) Award/Reject

(Fall) Enrollment Status

(Fall) Housing Status

(Fall) DE Nomination Indicator

TOTAL

CSV file - 1 row with following columns (with codes)

SSN

Last Name

First Name

Middle Initial

Street Address

City

State

Zip Code

Academic Year Award Counter

Academic Year Total

(Fall) College Code

(Fall) Award Amount

(Fall) Reject Code

(Fall) Award/Reject Date

(Fall) Cancellation Code

(Fall) Enrollment Status

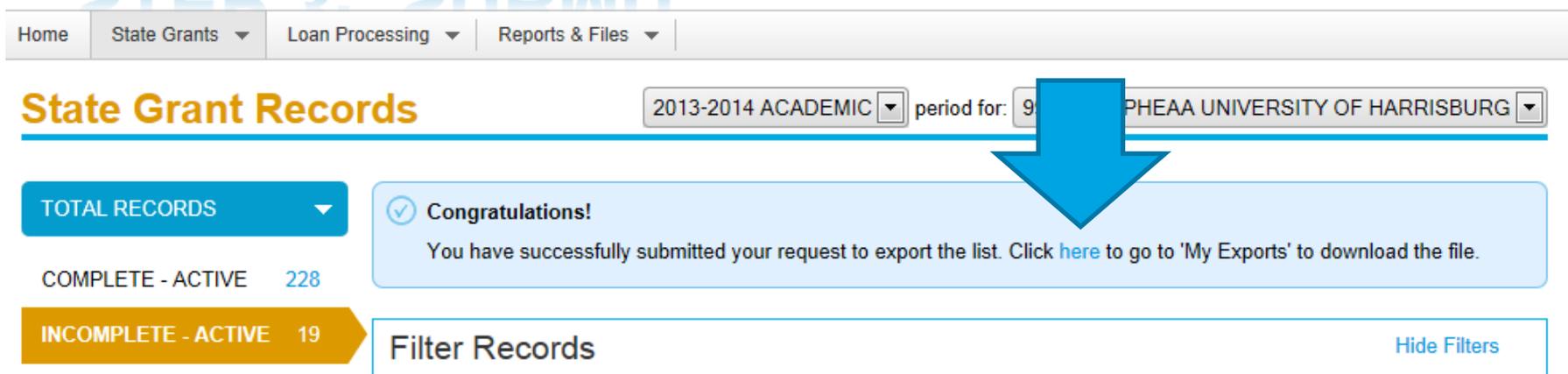
(Fall) Housing Status

(Fall) DE Nomination Indicator

# After Filter - Option 1

## Export to Excel or CSV file

### STEP 3: SUBMIT



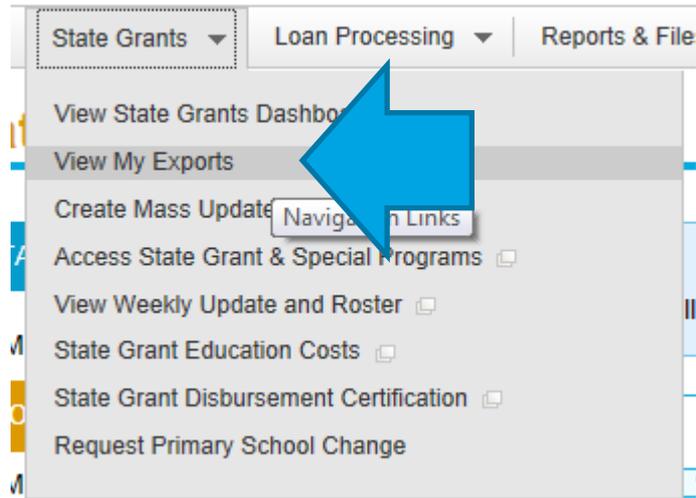
The screenshot shows the PHEAA State Grant Records interface. At the top, there is a navigation menu with 'Home', 'State Grants', 'Loan Processing', and 'Reports & Files'. Below this, the 'State Grant Records' section is displayed, with filters for '2013-2014 ACADEMIC' and 'PHEAA UNIVERSITY OF HARRISBURG'. A large blue arrow points to a confirmation message box that reads: 'Congratulations! You have successfully submitted your request to export the list. Click here to go to 'My Exports' to download the file.' Below the message, there are two buttons: 'Filter Records' and 'Hide Filters'. On the left side, there are two summary boxes: 'TOTAL RECORDS' (228) and 'INCOMPLETE - ACTIVE' (19).

- Results – ‘My Exports’
  - ★ Click here; or
  - ★ Access via Home page

# After Filter - Option 1

## Export to Excel or CSV file

- Drop Down; or
- State Grant Links; or
- Alerts



Welcome, CAROL GIL - Monday, September 30, 2013

A screenshot of the main dashboard. The navigation bar at the top includes 'Home', 'State Grants', 'Loan Processing', and 'Reports & Files'. The 'State Grants' section is highlighted with a blue arrow. The 'Messages' section is highlighted with a blue arrow and contains the text 'There are currently no messages'. The 'Alerts (Notifications)' section is highlighted with a blue arrow and contains two notifications: 'You have 1 exports in progress' and 'You have 6 exports ready to download'. A 'View My Exports' link is located at the bottom of the alerts section.

# After Filter - Option 1

## Export to Excel or CSV file

### My Exports

#### Requests In Progress

Export Name		Date Requested	Action
twenty	<a href="#">View Details</a>	09/26/2013 12:50:00 PM	<input type="button" value="Cancel"/>

#### Requests Ready To Download

Export Name		Date Completed	Action
PA Health	<a href="#">View Details</a>	09/27/2013 03:02:55 PM	<input type="button" value="Download"/> <input type="button" value="Delete"/>
PASFAA	<a href="#">View Details</a>	09/30/2013 09:55:24 AM	<input type="button" value="Download"/> <input type="button" value="Delete"/>

#### Requests That Have Been Downloaded

Export Name		Date Last Downloaded	Action
AB-F-DORM	<a href="#">View Details</a>	09/24/2013 12:41:06 PM	<input type="button" value="Download"/> <input type="button" value="Delete"/>
All Bloom	<a href="#">View Details</a>	09/23/2013 04:48:40 PM	<input type="button" value="Download"/> <input type="button" value="Delete"/>

 In Progress

 Come back later

 Ready

 Previously Downloaded

# After Filter - Option 2

## Cycle Through Records

2 - Full Time-Evening  
3 - Half-time Student  
4 - Less Than Half-Time

D - Not a High School Graduate  
D - Death of Student  
E - Cancelled due to Agency Error

D - Bachelor's Degree (Religion)  
C - Bachelor's Degree (All Other)  
F - 5 Yr Bona Fide Program

Reset Filters Apply Filters

Displaying 1 - 20 out of 258 Student Records

Records Selected (0) Add to New Mass Update

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
JILCOX, LINDA R 119 BUMBLE BEE DR MECHANICSBURG, PA 17055	555030145	1	\$1,970 Full Time Student Dormitory		\$1,970 Full Time Student Dormitory	\$3,940

- Individual Records
- Year selected
- 'One at a time':
  - ★ View
  - ★ Update

# After Filter - Option 2 Cycle Through Records

The screenshot shows the Alec financial aid system interface. At the top left is the Alec logo with the tagline "THE FINANCIAL AID KNOWLEDGE". The top right displays a welcome message: "Welcome, CAROL GIL - Tuesday, October 1, 2013". A navigation menu includes "Home", "State Grants", "Loan Processing", and "Reports". Below the menu, there are buttons for "Previous Record" and "Next Record", with a central status indicator "Record 16 of 18 Student Records". A blue arrow labeled "Total Records" points to this indicator. A blue arrow labeled "Back to List" points to a link "< Back to Student Listing". A blue arrow labeled "Next" points to the "Next Record" button. The main content area shows "State Grant Information for: 99999997-01 Pheaa Quality" and "Leleine J Student". Below this, there are buttons for "View Eligibility for Student", "Update Record", and "Special Request". A table of student information is visible, with a blue arrow labeled "For Year Selected" pointing to the "2013-2014 ACADEMIC" dropdown menu. The table includes columns for Record Status, Agency Status, Last Update, Last User, School Status, and Received Date.

Record Status:	Complete	Last Update:	09/30/2013	School Status:	Primary ?
Agency Status:	Financially Independent	Last User:	PH11874	Received Date:	01/01/2013

# After Filter - Option 2

## Cycle Through Records

**Alec** THE FINANCIAL AID KNOW-IT-ALL

Welcome, CAROL GIL - Tuesday, October 1, 2013

Home | State Grants | Loan Processing | Reports & Files

«Previous Record | Record 16 of 18 Student Records | Next Record »

[« Back to Student Listing](#)

State Grant Information for: 99999997-01 Pheaa Quarter University

### Update Record: Madeleine J Student

Prior Name(s):

SSN: 001-01-0267    ACCT#: 75-3486-7995    Award Counter (Grand Total): 0.67

[View Record](#)    [Special Request](#)

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2013-2014 ACADEMIC

Record Status:	Complete	Last Update:	09/30/2013	School Status:	Primary ?
Dependency Status:	Financially Independent	Last User:	PH11874	Received Date:	01/01/2013

Award/Reject Fall:	Grant Cancelled	Winter:	\$1,313	Spring:	\$1,313
--------------------	-----------------	---------	---------	---------	---------

[Cancel/Reject](#)    [Cost Override](#)    [Award Adjustment](#)    [Distance Education Program](#)

#### Student Record

[Update Record](#)

**Demographic Information**

Address: 1200 North 7th Street  
Harrisburg, PA, 17102

Phone: (717) 555-1212    Email: student@pheaa.org

**School Information**

- Can choose to Update and Cycle in 'Update' mode and submit necessary corrections

# After Filter - Option 2

## Cycle Through Records

 THE FINANCIAL AID KNOW-IT-ALL Welcome, CAROL GIL - Tuesday, October 1, 2013

Home | State Grants | Loan Processing | Reports & Files

«Previous Record Record 16 of 18 Student Records Next Record »

[« Back to Student Listing](#)  
**Eligibility Record: Madeleine J Student**

SSN: 001-01-0267    ACCT#: 75-3486-7995    Award Counter (Grand Total): 0

Last Update: 09/30/2013    Last User: PH11874 

Term Records	2013 - 2014 Fall	2013 - 2014 Winter	2013 - 2014 Spring	2013 - 2014 Academic Total
Halftime:	No	No	No	
School Name (OE Code):	99999997 -01 Pheaa Quarter University	99999997 -01 Pheaa Quarter University	99999997 -01 Pheaa Quarter University	
Program of Study:	2 Year Terminal Prog in a 4 Year University	2 Year Terminal Prog in a 4 Year University	2 Year Terminal Prog in a 4 Year University	

- Can choose to Eligibility and Cycle through Eligibility Records

# After Filter - Option 3

## Create Mass Update Queue

The screenshot shows a web interface for managing student records. At the top, there are three filter dropdown menus: '2 - Full Time-Evening', '3 - Half-time Student', '4 - Less Than Half-Time'; 'D - Not a high school Graduate', 'D - Death of Student', 'E - Cancelled due to Agency Error'; and 'D - Bachelor's Degree (Religion)', 'C - Bachelor's Degree (All Other)', 'F - 5 Yr Bona Fide Program'. Below the filters are 'Reset Filters' and 'Apply Filters' buttons. A status bar indicates 'Displaying 1 - 20 out of 258 Student Records' and includes 'Export to Excel/CSV' and 'Go to First Record >' buttons. A table of records is shown with a selection column on the left. The first record is selected, and a blue circle highlights the selection checkbox. A button labeled 'Add to New Mass Update' is positioned above the table.

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
JILCOX, LINDA R 119 BUMBLE BEE DR MECHANICSBURG, PA 17055	555030145	1	\$1,970 Full Time Student Dormitory		\$1,970 Full Time Student Dormitory	\$3,940

- Select records ON PAGE
- 'Add to New Mass Update' queue
- ★ Limited to 100 records (5 pages)

# OTHER PLACES

## Cycle Through Records

- Can also cycle through from dashboard

Record Status	Total Records	Updates By	9
<b>COMPLETE - ACTIVE</b> Eligibility has been determined for these records. Some of the terms may include need based rejects.	30	School PHEAA/Students	
<b>INCOMPLETE - ACTIVE</b> These records are missing information or are under review. Some of the terms			

View Records List  
Process Records Individually  
Export Records List

Welcome, CAROL GIL - Monday, September 30, 2013

AID KNOW-IT-ALL

rocessing ▾ Reports & Files ▾

Record 1 of 246 Student Records  
[Next Record >](#)

[Back to Dashboard](#)

State Grant Information for: 99999999-01 Pheaa University Of Harrisburg

**Student Record: Aaliyah C Student**

Prior Name(s):

SSN: 001-01-0037 ACCT#: 44-8294-9803 Award Counter (Grand Total): 1

2013-2014 ACADEMIC ▾ Record Status: Complete Last Update: 09/23/2013 School Status: Primary



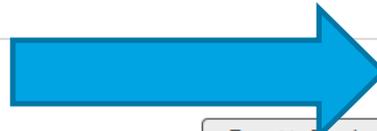
# OTHER PLACES

## Cycle Through Records

- From unsuccessful mass update records  
'View Records Individually'

### Unsuccessful Updates

SSN	Student Name	Details
001010019	JAMES STUDENT	Request cannot be processed since the status of the State Grant record is currently rejected, adjusted or cancelled.
001010253	LABAN STUDENT	Request cannot be processed since the State Grant record is incomplete.
001010265	MADAN STUDENT	Invalid Entry - S10 Special Case
001010266	MADDOX STUDENT	Invalid entry - S10 income/asset review case
001010273	MADELINE STUDENT	Request cannot be processed since the status of the State Grant record is currently rejected, adjusted or cancelled.
001010274	MACADRIAN STUDENT	Request cannot be processed since the status of the State Grant record is currently rejected, adjusted or cancelled.
001010275	MABON STUDENT	Request cannot be processed since the status of the State Grant record is currently rejected, adjusted or cancelled.



View Records Individually >

Export to Excel

Create Another Mass Update

# OTHER PLACES

## Cycle Through Records

Back to Mass  
Update  
Report

Welcome, CAROL GIL - Wednesday, October 2, 2013

FINANCIAL AID KNOW-IT-ALL

Loan Processing | Reports & Files

Record 1 of 7 Student Records

Request cannot be processed since the status of the State Grant record is currently rejected, adjusted or cancelled.

Next Record >

[Back to Mass Update Report](#)

State Grant Information for: 99999997-01 Pheaa Quarter University

### Student Record: Macadrian C Student

Prior Name(s):

[View Eligibility for Student](#)

SSN: 001-01-0274    ACCT#: 71-9111-7386    Award Counter (Grand Total): 0

[Update Record](#)

[Special Request](#)

2013-2014 ACADEMIC

Record Status:	Complete	Last Update:	09/18/2013	School Status:	Primary ?
Dependency Status:	Dependent	Last User:	FGXGK	Received Date:	01/01/2013

[Award Information](#)

[School Notes](#)

[Activity Log](#)

[Application Info](#)

[DE Pilot Program](#)

Student Information

# Cycle Through Records Summary

- From Dashboard
- From Listing
- From Unsuccessful after 'Run Mass Update'

# Request School Change

SSN or Last Name Search Your Account Contact Us Logout

Welcome, CAROL GIL - Monday, September 16, 2013

Alec THE FINANCIAL AID KNOW-IT-ALL

Home State Grants Loan Processing Reports & Files

### State Grants

- View State Grants Dashboard  
Standard Lists and Worklists
- Create Mass Update Queue  
Create Mass Update Queue
- View Weekly Update and Roster  
Download from PageCenter
- State Grant Disbursement Certification  
Disbursement Certification Form
- View My Exports  
View Exported Student Lists
- Access State Grant & Special Programs  
OCWebconnect
- State Grant Education Costs  
Education Cost Form
- Request Primary School Change  
Change Primary School in Student Record**

### Messages

There are currently no messages

### Alerts (Notifications)

- You have 3 exports ready to download  
View My Exports

### Order Materials

- Replaces FG5T
- Accessible on Menu

SSN or Last Name Search Your Account Contact Us Logout

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### State Grants

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- State Grant Education Costs
- State Grant Disbursement Certification
- Request Primary School Change**

### Loan Processing

- Real-time Processing with AES Loans  
OneLink GUI
- View Students AES Accounts  
Account Access
- Direct Access to the AES System  
OCWebconnect

### Messages

There are currently no messages

### Alerts (Notifications)

- You have 3 exports ready to download  
View My Exports

### Order Materials

Program Materials  
Order loan processing forms, brochures & guides for students, or deferment and discharge forms.

### Training & Publications

Training Event Schedule  
View upcoming training opportunities offered by AES.

# Request School Change

Home | State Grants | Loan Processing | Reports & Files

## Change Primary School Request

SSN:

---

Changes submitted will be reviewed by PHEAA.

Period: 2013 - 2014 ACADEMIC

Student's Last Name:

➔ When submitting this form prior to the start of the term and/or student's actual enrollment, I am verifying that a statement from the student authorizing the enrollment change is on file.

---

### School Information

Enter detailed information for each available term. All fields are required.

	Fall	Winter	Spring
Branch Campus:	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>
Program of Study:	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>
Housing Status:	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>
Enrollment Status:	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>

- Result when choose from Home Page Menu
- Not accessible/grey
  - ★ Fall (after Sept 30)

# Request School Change

- Not Primary
- IS Alternate
- ★ SSN and Name will prepopulate

[Award Information](#) | [Activity Log](#) | [Application Info](#)

## Student Information

Address: 751 Wildwood Terrace  
Boiling Springs, PA 17007

Phone: (610) 926-5133

Email: phear@pheaa.org

H.S. Graduation:

## Estimated Eligibility for Your Institution

Institutions are NOT Permitted to Use this Data to Credit an Award

	Fall	Winter	Spring	Academic Year Total
Alternate School:				
Full Time Award:				
Part Time Award:				
Housing Status:				

⊕ If the student will be enrolled at your institution for the current Academic Period, you can submit a request to change the student's school to your school.

[Change Student's School](#)

## Grant Information

# Request School Change

## Change Primary School Request

SSN: 0939

Changes submitted will be reviewed by PHEAA.

Period: 2013 - 2014 ACADEMIC

Student's Name: Faust Heer939

When submitting this form prior to the start of the term and/or student's actual enrollment, I am verifying that a statement from the student authorizing the enrollment change is on file.

## School Information

Enter detailed information for each available term. All fields are required.

	Fall	Winter	Spring
Branch Campus:	- Select -	99999997-01 Pheaa Qu	99999997-01 Pheaa Qu
Program of Study:	- Select -	C-Bachelor's Degree (AI)	C-Bachelor's Degree (AI)
Housing Status:	- Select -	1-Dormitory	1-Dormitory
Enrollment Status:	- Select -	1-Full Time Student	1-Full Time Student

Cancel Submit

# IMPORTANT!

- Successful = logged to PHEAA Staff
- Updates NOT immediate
- Review Activity Log if you are alternate

## STEP 1: SELECT TAB

THE FINANCIAL AID KNOW-IT-ALL

Home | State Grants | Loan Processing | Reports & Files

State Grant Information for: 99999997-01 Pheaa Quarter University

### Student Record: Laban X Student

Prior Name(s): [View Eligibility for Student](#)

SSN: 001-01-0253 ACCT#: 75-7017-1589 Award Counter (Grand Total): 0.66 [Update Record](#) [Special Request](#)

2013:2014 ACADEMIC

Record Status: **Complete** Last Update: 09/13/2013 School Status: **Primary**

Dependency Status: **Financially Independent** Last User: PH11874 Received Date: 01/01/2013

[Award Information](#) [School Notes](#) [Activity Log](#) [Application Info](#)

### Student Information

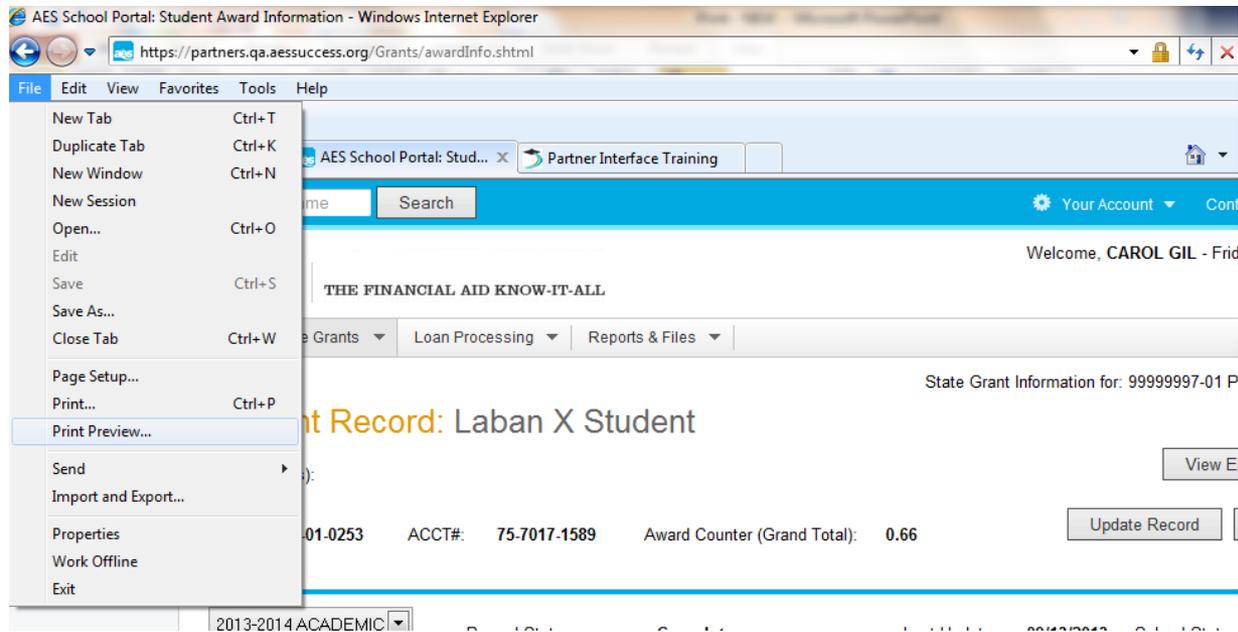
Address: 1200 North 7th Street Harrisburg, PA 17102 Phone: (717) 555-1212 Email: student@pheaa.org H.S. Graduation: 2005

### Grant Information

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	
Program of Study:	Registered Nursing Program	Registered Nursing Program	Registered Nursing Program	
Award Date:	09/13/2013	09/13/2013	09/13/2013	

# Print

## STEP 2: SELECT FILE AND PRINT PREVIEW



**WARNING! NOT FOLLOWING  
STEPS WILL RESULT IN MULTI PAGES**

# Print

## STEP 3: REDUCE PRINT SIZE

Print Preview

1 Page View

Shrink To Fit

- Shrink To Fit
- 30%
- 50%
- 60%
- 70%
- 80%
- 90%
- 95%
- 100%
- 125%
- 150%
- 200%
- Custom

Change Print Size (Alt+S)

Page 1 of 2

Record: **Laban X Student**

Record Status: Complete Last Update: 09/13/2013 School Status: Primary

Dependency Status: Financially Independent Last User: PH11874 Received Date: 01/01/2013

**Student Information**

1200 North 7th Street  
Harrisburg, PA 17102

Phone: (717) 555-1212 Email: student@pheaa.org H.S. Graduation: 2005

**Grant Information**

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	9999997-01 Pheaa Quarter University	9999997-01 Pheaa Quarter University	9999997-01 Pheaa Quarter University	
Program of Study:	Registered Nursing Program	Registered Nursing Program	Registered Nursing Program	
Award Date:	09/13/2013	09/13/2013	09/13/2013	
Housing Status:	Dormitory	Dormitory	Dormitory	
Enrollment Status:	Full Time Student	Full Time Student	Full Time Student	
Award/Reject:	\$1,313	\$1,313	Grant Cancelled	\$2,626
Alternate Award (AA)	\$656	\$656	\$0	\$1,312

## RESULT: FORMATTED TO ONE PAGE

AES School Portal: Student Award Information Page 1 of 1

Date Grant Information for: 9999997-01 Pheaa Quarter University

**Student Record: Laban X Student**

Print Name(s):  
SSN: 001414220 ACCT# 7570171899 Award Counter (Grand Total): 0.00  
2025-2026 ACADEMIC Record Status: Complete Last Update: 09/13/2013 School Status: Current  
Dependency Status: Financially Independent Last User: 17611074 Received Date: 01/01/2013

**Student Information**  
Address: 1200 North 7th Street Phone: (717) 833-1212 Email: students@pheaa.org P.S. Graduation: 2018

**Grant Information**

	Fall	Winter	Spring	Academic Year Total
School Name (DS Code)	9999997-01 Pheaa Quarter University	9999997-01 Pheaa Quarter University	9999997-01 Pheaa Quarter University	
Program of Study	Registered Nursing Program	Registered Nursing Program	Registered Nursing Program	
Award Date	09/13/2013	09/13/2013	09/13/2013	
Housing Status	Demistry	Demistry	Demistry	
Enrollment Status	Full Time Student	Full Time Student	Full Time Student	
Award Amount	\$1,312	\$1,312	Grant Cancelled	\$2,624
Alternate Award (AA)	\$0.00	\$0.00	\$0	\$1,312
Enrollment Status for AA	PartTime	PartTime	PartTime	
Financial Exemption				0.0
Award Courses	0.00	0.00	0	0.00
Award Type	Processed	Processed	Cancelled	
Cancellation Reason			Student Not Enrolled	
School Adjustment Reason				
PHSA A Adjustment Reason				
Disbursement Checks				
Online Credits				
Academic Level	2 - Second Academic Year	2 - Second Academic Year	2 - Second Academic Year	
Next College Cost	\$23,303	\$23,303	\$23,303	
PHSA A Estimated Pct	50%	50%	NA	
PHSA A PFC	0	0	0	

- Recommended –
- ★ Award (60%)
- ★ Activity (60%)
- ★ School Notes (60%)
- ★ App Info (50%)

# Other Updates

SSN or Last Name Search Your Account Contact Us Logout

Welcome, CAROL GIL - Tuesday, September 17, 2013

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Home State Grants Loan Processing Reports & Files

State Grants

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- Request Primary School Change

My Exports

- Exported Student Lists
- Access State Grant & Special Programs
- Webconnect
- State Grant Education Costs
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- Request Primary School Change
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Messages

There are currently no messages

Alerts (Notifications)

- You have 3 exports ready to download

View My Exports

Order Materials

Program Materials

Delivers to page on Doc Library

Does not open app

Welcome, CAROL GIL - Tuesday, September 17, 2013

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Disbursement Certification Form

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OC/Webconnect
- State Grant Education Costs  
Education Cost Form
- Request Primary School Change  
Change Primary School in Student Record

Messages

There are currently no messages

Alerts (Notifications)

- You have 3 exports ready to download

View My Exports

Order Materials

# Other Updates

- Opens Document Library in new window
- Can then open Web Cert

[Home](#) | [Logout](#)

- ☒ [Main Menu](#)
- ☒ [Asset Management Reports Documentation](#)
- ☒ [BPAMS: Business Partner Access Management System](#)
- ☒ [Compliance](#)
- ☒ [Newsletters](#)
- ☒ [Financial Aid Services](#)
- ☒ [Loan Origination/FTS Refund](#)
- ☒ [OC Webconnect](#)
- ☒ [PA School Services](#)
- ☒ [PageCenter Guide](#)
- ☒ [Special Programs](#)
- ☒ [State Grant Program](#)

[Main Menu](#) / [State Grant Program](#) / Certification Procedures, Workshop

- ☒ [2013-14 Academic Year and 2014 Summer Certification Proce](#)
- ☒ [2013-14 Certification Procedures Workshop Presentation - dlr](#)
- ☒ [2013-14 Certification Procedures Workshop Q&A - dlr2086](#)
- ☒ [2013-14 Credit Reporting Q&A - dlr2087](#)
- ☒ [Income Validation Handout - dlr2066](#)
- ☒ [Transmission Best Practices Handout - dlr2064](#)
- ☒ [2012-13 Academic year and 2013 Summer Certification Proce](#)
- ☒ [2012-13 Certification Procedures Workshop Presentation \(Pov](#)
- ☒ [2012-13 Certification Procedures Workshop Q&A - dlr1999](#)
- ☒ [2013-14 State Grant Disbursement Roster Certification Page \(](#)
- ☒ [2012-13 State Grant Disbursement Roster Certification Page \(](#)

## STATE GRANT DISBURSEMENT CERTIFICATION

Please refer to the [State Grant Certification Procedures](#) before providing the information requested below. Remember when certifying a Summer term disbursement to refer to the State Grant Certification Procedures for the previous academic year (for example, refer to the 2013-14 Procedures when certifying the 2014 Summer term).

**WARNING:** Any person who knowingly makes a false statement or misrepresentation on this form is subject to penalties which may include fines or imprisonment under the United States Criminal Code and 20 U.S.C. 1097.

1. OE Code:

2. School Information:

Name:

Address:

Phone Number:

To be completed by a financial aid administrator or other school official authorized to certify financial aid forms.

3. Certification Period:

# Other Updates

## ACTIVITY LOG

- Displays 'System' instead of blank if update was a program
- Displays Period
  - ★ Display Activity for All Years
  - ★ No Arrow if no detail

Award Information	School Notes	Activity Log	Application Info			
<b>Activity Log</b> <input type="checkbox"/> Display Activity for All Years						
Activity Type	Period	Description	Activity Date	Close Date	Contact Description	User
▶ Miscellaneous	2013-2014	GRANT ENROLLMENT CHANGE BY SCHOOL - PARTNER INTERFACE	04/12/2013	04/12/2013	To Grants	CAROL A GILL
▶ SC	2013-2014	GRANT ENROLLMENT CHANGE BY SCHOOL - PARTNER INTERFACE	04/10/2013	04/10/2013	70	CAROL A GILL
▶ SC	2013-	PROGRAM OF STUDY CHANGE BY	04/10/2013	04/10/2013	70	CAROL A

# Other Updates

## SPECIAL REQUEST

- Displays Year/Period
- Reminder – Refer to Q&A for guidelines

The screenshot displays the Alec financial aid system interface. At the top left is the Alec logo with the tagline "THE FINANCIAL AID KNOW-IT-ALL". On the top right, it says "Welcome". Below the header is a navigation menu with "Home", "State Grants", "Loan Processing", and "Reports & Files". The main content area is titled "Special Request for: Laban X Student" and includes the following information:

Prior Name(s):					
SSN:	001-01-0253	ACCT#:	75-7017-1589	Award Counter (Grand Total):	0.66
Period:	2013 - 2014 ACADEMIC	Last Update:	09/13/2013	Last User:	PH11874

Below the table is a text input field with the placeholder text: "Enter your Special Request for this student record."

# Other Updates

## SCHOOL NOTES

- Displays Period
- Notes for all Years option
- Add Another Note option
- ★ No longer just on update

2012-2013 ACADEMIC ▾

Record Status: **Incomplete** Last Update: **09/13/2013** School Status: **Primary** ?  
Dependency Status: **Dependent** Last User: **PH11874** Received Date: **01/01/2012**

Award Information | **School Notes** | Activity Log | Application Info

**School Notes** [Add Another Note](#)  Display Notes for All Years

User Name/ID	Period	Comment Date	Comment
CAROL A GILL PH11874	2012-2013	09/13/2013	test test 2012
CAROL A GILL PH11874	2013-2014	09/13/2013	add note without update #2
CAROL A GILL PH11874	2013-2014	09/13/2013	add school note test 1

# Other Updates

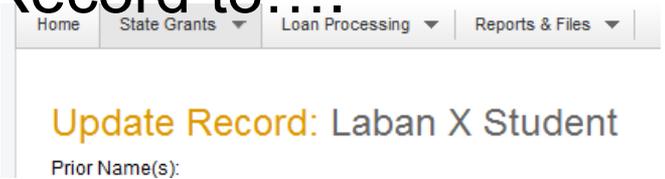
## UPDATING RECORDS

- Academic Level (year in school) updatable for Nursing schools
- Award Adjustments – ‘undo’ an adjustment that was previously adjusted to \$0
- Academic Progress –update incomplete records
- (Mass) Branch campus is based on period so order of dropdowns changed
- (Mass) Check boxes are now links for ‘remove’
- (Mass) Can cycle through unsuccessful updates

# Other Updates

## VIEWING DATA

- Title for Update page from Student Record to.....
- Award tab – PHEAA Estimated Pell (cancelled terms, etc.) – displays ‘Not Applicable’ instead of all 9’s
- Eligibility – Records for older years now displaying (previously received ‘record not found’)
- Old Need reject descriptions now appear in Eligibility history



# Other Updates

## VIEWING DATA

- Reinstating for 'not enrolled' is 'now enrolled'
- 2 through 10 choices no longer display for Summer since not applicable
- Application Info tab – Parent items 3, 4, 9 and 10 now display in upper portion for dependent students

2013-2014 ACADEMIC ▾

Record Status: **Complete** Last Update: **09/13/2013** School Status:

Dependency Status: **Dependent** Last User: **PH11874** Received Date:

Award Information School Notes Activity Log Application Info **DE Pilot Program**

**Application Info**

The information displayed is the most recent information entered in the Status Notice Application.

	Student	Parent(s)
1. Date of Birth:	07/15/1990	
2. State of Legal Residence:	PA	PA
3. Residency Established:		
4. Current Marital Status:	Unmarried/Single	Married/Remarried
5. Bachelor's Degree Before 7/1 of Application Year:	No	
6. High School Diploma or GED Date:	06/2005	
7. High School State or GED:	PA	
8A. Veteran of the U.S. Armed Forces:	No	
8B. Month/Year of Discharge:		
9. Number of Family Members:	0	3
10. Number of College Students:	0	1

# Other Updates

## VIEWING DATA – ALTERNATE SCHOOLS

- Estimates that are ineligible (rejects) now display
  - ★ Previously only showing awards and blank when ineligible
- Alternate (that have branch campuses) now displays to what branch the estimate applies
- Drop downs extend when needed

# Resource Updates



## Partner Interface Training

Want to learn more about Partner Interface? Check out the resources we have to offer to help you navigate through our new web product.

Training Tutorials	Run Time
 <a href="#">Sign In and Search (SWF)</a>	00:03:14
 <a href="#">View Student Record (SWF)</a> <a href="#">Main</a>   <a href="#">Award Information</a>   <a href="#">Comment History</a>   <a href="#">Activity Log</a>   <a href="#">Application Info</a>	00:08:45
 <a href="#">View Eligibility Summary (SWF)</a>	00:01:24
 <a href="#">Update Record (SWF)</a>	00:04:11
 <a href="#">Submit Special Request (SWF)</a>	00:01:57
 <a href="#">Export to Excel (SWF)</a>	00:03:09
 <a href="#">Access the State Grant Dashboard (SWF)</a>	00:06:02
 <a href="#">Create Mass Update Queue (SWF)</a>	00:08:02
 <a href="#">Credit Reporting (SWF)</a>	00:06:41

(SWF) Adobe Flash Plugin Required

### Additional Resources

- [Partner Interface Webinars](#)
- [Partner Interface User Guide \(PDF\) Revised](#)
- [Partner Interface Transaction 'Cheat Sheet' \(PDF\)](#)
- [Partner Interface Q&A \(PDF\)](#)

## [pheaa.org/training](http://pheaa.org/training)

- ★ Navigation tutorials
  - ★ no audio
  - ★ zoom using browser
- ★ Webinars
- ★ User Guide
- ★ Q&A

# QUESTIONS

?

# Resources

Contact State Grant and Special Programs staff:

- Email: [sghelp@pheaa.org](mailto:sghelp@pheaa.org) (an email reserved for financial aid administrators only)
- 1-800-443-0646, option 4 – to discuss transmissions
- 1-800-443-0646, option 3, option 1 (a private number reserved for the use of financial aid administrators only)