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

Delivers to year/period selected
### Dashboard and Student Listings

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

<table>
<thead>
<tr>
<th>Record Status</th>
<th>Total Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPLETE - ACTIVE</td>
<td>351</td>
</tr>
<tr>
<td>INCOMPLETE - ACTIVE</td>
<td>0</td>
</tr>
<tr>
<td>COMPLETE - REJECT</td>
<td>0</td>
</tr>
<tr>
<td>INCOMPLETE - INACTIVE</td>
<td>0</td>
</tr>
</tbody>
</table>

#### Updates By

<table>
<thead>
<tr>
<th>Year Range</th>
<th>School</th>
<th>PHEAA Students</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/10 - 8/15</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>8/17 - 9/23</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>9/24</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>9/25</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>9/26</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>9/27</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>9/29</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>TODAY</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**ALL RECORDS**

Includes complete and incomplete records for Active, Reject, and Inactive statuses

<table>
<thead>
<tr>
<th>School</th>
<th>PHEAA Students</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>246</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>0</td>
<td>0</td>
</tr>
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<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
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<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**ALL RECORDS**

Includes complete and incomplete records for Active, Reject, and Inactive statuses

<table>
<thead>
<tr>
<th>School</th>
<th>PHEAA Students</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>246</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**HIDE OTHER STATUSES**

Pennsylvania Higher Education Assistance Agency
# Dashboard and Student Listings

## Total Records in Each Status Options:

<table>
<thead>
<tr>
<th>Record Status</th>
<th>Total Records</th>
<th>Updates By</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPLETE - ACTIVE</td>
<td>30</td>
<td>School</td>
</tr>
<tr>
<td>INCOMPLETE - ACTIVE</td>
<td></td>
<td>PHEAA/Students</td>
</tr>
</tbody>
</table>

- View Records List
- Process Records Individually
- Export Records List
Dashboard and Student Listings

‘ALL RECORDS’ - 2 OPTIONS

<table>
<thead>
<tr>
<th>ALL RECORDS</th>
<th>School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Includes complete and incomplete records for Active, Reject and Inactive statuses</td>
<td>PHEAA/Students</td>
</tr>
</tbody>
</table>

- 351

- View Records List
- Export Records List

Size Limitations

- Cannot Process Records Individually in ‘All’
- May be forced to Filter Lists
Reasons to filter:

🌟 Required to filter (size limit/threshold)
🌟 Narrow down list for specific criteria
**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:**
    - [Select]
    - Collectibles
    - Validation Processing
    - Late Processing

- **Term Level Filters**
  - [Select]

---

- **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

State Grant Records

Record Level – All Records

Filter Records

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

Special Conditions: - Select -

Term Level Filters:
- Fall
- Winter
- Spring
- Any

Eligibility Date: From: mm/dd/yyyy To: mm/dd/yyyy
Distance Education Program:

Eligibility Status: - Select -
Credit Info: - Select -
Housing Status: - Select -

Enrollment Status:
- Full Time Student
- Full Time Evening
- Half Time Student
- Attending Less Than Half Time

Cancellation Reasons:
- Graduated from a Bachelor’s Degree
- Not a High School Graduate
- Death of Student
- Cancelled due to Agency Error

Program of Study:
- 5 Year Co-op Work-Study (All Majors)
- Bachelor’s Degree (Religion Major)
- Bachelor’s Degree (All Other Majors)
- 2 Year Terminal Prog 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@phea.org
- **H.S. Graduation:** 21

#### Grant Information

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

- **Pending**
- Can appear in any Record Status upon Filter
- Record may not appear when drilling down with term level filters
## Filter Records

No filters have been applied. Add Filters.

Displaying 1 - 20 out of 281 Student Records

<table>
<thead>
<tr>
<th>Records Selected (0)</th>
<th>Add to New Mass Update</th>
</tr>
</thead>
</table>

[Export to Excel/CSV] [Go to First Record]
STEP 2: SELECT CRITERIA

Term Level

- Eligibility Date
- Eligibility Status
- Credit Info
- Housing
- Enrollment
- Cancellation
- Program of Study
- SGDEPP
Eligibility Date Range

- Date Eligibility Determined (Award or Reject); or
- Date Award Cancelled; or
- Date Award Adjusted
STEP 3: APPLY OR RESET FILTERS
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
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

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
**After Filter - Option 1**

Export to Excel or CSV file

**EXAMPLES**

- **Excel** – Settings tab; Tab with Data in English

<table>
<thead>
<tr>
<th>School Code</th>
<th>SSN</th>
<th>Name</th>
<th>Address</th>
<th>Award Counter (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>SSN</th>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Street Address</th>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Academic Year Award Counter</th>
<th>Academic Year Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>(Fall) College Code</td>
<td>(Fall) Award Amount</td>
</tr>
<tr>
<td></td>
<td>(Fall) Reject Code</td>
</tr>
<tr>
<td>(Fall) Award/Reject Date</td>
<td>(Fall) Cancellation Code</td>
</tr>
<tr>
<td>(Fall) Enrollment Status</td>
<td>(Fall) Enrollment Status</td>
</tr>
<tr>
<td>(Fall) Housing Status</td>
<td>(Fall) Housing Status</td>
</tr>
<tr>
<td>(Fall) DE Nomination Indicator</td>
<td>(Fall) DE Nomination Indicator</td>
</tr>
</tbody>
</table>
After Filter - Option 1
Export to Excel or CSV file

STEP 3: SUBMIT

State Grant Records

TOTAL RECORDS
COMPLETE - ACTIVE 228
INCOMPLETE - ACTIVE 19

Filter Records

Congratulations!
You have successfully submitted your request to export the list. Click here to go to 'My Exports' to download the file.

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
### My Exports

#### Requests In Progress

<table>
<thead>
<tr>
<th>Export Name</th>
<th>Date Requested</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>twenty</td>
<td>09/26/2013 12:50:00 PM</td>
<td>Cancel</td>
</tr>
</tbody>
</table>

#### Requests Ready To Download

<table>
<thead>
<tr>
<th>Export Name</th>
<th>Date Completed</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA Health</td>
<td>09/27/2013 03:02:55 PM</td>
<td>Download Delete</td>
</tr>
<tr>
<td>PASFAA</td>
<td>09/30/2013 09:55:24 AM</td>
<td>Download Delete</td>
</tr>
</tbody>
</table>

#### Requests That Have Been Downloaded

<table>
<thead>
<tr>
<th>Export Name</th>
<th>Date Last Downloaded</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB-F-DORM</td>
<td>09/24/2013 12:41:06 PM</td>
<td>Download Delete</td>
</tr>
<tr>
<td>All Bloom</td>
<td>09/23/2013 04:48:40 PM</td>
<td>Download Delete</td>
</tr>
</tbody>
</table>
After Filter - Option 2
Cycle Through Records

- Individual Records
- Year selected
- ‘One at a time’:
  - View
  - Update
After Filter - Option 2
Cycle Through Records

Total Records

Back to List

For Year Selected

Next
After Filter - Option 2
Cycle Through Records

- Can choose to Update and Cycle in ‘Update’ mode and submit necessary corrections
After Filter - Option 2
Cycle Through Records

Can choose to Eligibility and Cycle through Eligibility Records
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
OTHER PLACES
Cycle Through Records

From unsuccessful mass update records
‘View Records Individually’

<table>
<thead>
<tr>
<th>SSN</th>
<th>Student Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>001010019</td>
<td>JAMES STUDENT</td>
<td>Request cannot be processed since the status of the State Grant record is currently rejected, adjusted or cancelled.</td>
</tr>
<tr>
<td>001010253</td>
<td>LABAN STUDENT</td>
<td>Request cannot be processed since the State Grant record is incomplete.</td>
</tr>
<tr>
<td>001010265</td>
<td>MADAN STUDENT</td>
<td>Invalid Entry - S10 Special Case</td>
</tr>
<tr>
<td>001010266</td>
<td>MADDOX STUDENT</td>
<td>Invalid entry - S10 Income/asset review case</td>
</tr>
<tr>
<td>001010273</td>
<td>MADELINE STUDENT</td>
<td>Request cannot be processed since the status of the State Grant record is currently rejected, adjusted or cancelled.</td>
</tr>
<tr>
<td>001010274</td>
<td>MACADRIAN STUDENT</td>
<td>Request cannot be processed since the status of the State Grant record is currently rejected, adjusted or cancelled.</td>
</tr>
<tr>
<td>001010275</td>
<td>MABON STUDENT</td>
<td>Request cannot be processed since the status of the State Grant record is currently rejected, adjusted or cancelled.</td>
</tr>
</tbody>
</table>
OTHER PLACES
Cycle Through Records
From Dashboard

From Listing

From Unsuccessful after ‘Run Mass Update’
Request School Change

- Replaces FG5T
- Accessible on Menu
Request School Change

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

#### Student Information

<table>
<thead>
<tr>
<th>Address</th>
<th>Phone</th>
<th>Email</th>
<th>H.S. Graduation</th>
</tr>
</thead>
<tbody>
<tr>
<td>751 Wildwood Terrace, Boiling Springs, PA 17007</td>
<td>(610) 926-5133</td>
<td><a href="mailto:pheer@pheaa.org">pheer@pheaa.org</a></td>
<td></td>
</tr>
</tbody>
</table>

#### Estimated Eligibility for Your Institution

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

<table>
<thead>
<tr>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
<th>Academic Year Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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]
Request School Change

Change Primary School Request

SSN: 0939

Changes submitted will be reviewed by PHEAA.
Period: 2013 - 2014 ACADEMIC
Student's Name: [Student's 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.

<table>
<thead>
<tr>
<th></th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Branch Campus:</td>
<td>- Select -</td>
<td>09900007-01 Pheaa Qtr</td>
<td>09900007-01 Pheaa Qtr</td>
</tr>
<tr>
<td>Program of Study:</td>
<td>- Select -</td>
<td>C-Bachelor's Degree (AI)</td>
<td>C-Bachelor's Degree (AI)</td>
</tr>
<tr>
<td>Housing Status:</td>
<td>- Select -</td>
<td>1-Dormitory</td>
<td>1-Dormitory</td>
</tr>
<tr>
<td>Enrollment Status:</td>
<td>- Select -</td>
<td>1-Full Time Student</td>
<td>1-Full Time Student</td>
</tr>
</tbody>
</table>

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

Pennsylvania Higher Education Assistance Agency
STEP 1: SELECT TAB

Student Record: Laban X Student

SSN: 001.01.0253
ACCT#: 75-7017-1569
Award Counter (Grand Total): 0.66

State Grant Information:
- 2013-2014 ACADEMIC YEAR:
  - Record Status: Complete
  - Last Update: 09/13/2013
  - School Status: Primary
  - Dependency Status: Financially Independent
  - Last User: PHH1874
  - Received Date: 01/01/2013

Student Information:
- Address: 1200 North 7th Street, Harrisburg, PA 17110
- Phone: (717) 555-1212
- Email: student@phea.org
- H.S. Graduation: 2005

Grant Information:

<table>
<thead>
<tr>
<th>Fall School Name (OE Code)</th>
<th>Winter School Name (OE Code)</th>
<th>Spring School Name (OE Code)</th>
<th>Academic Year Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>99999997-01 Pheaa Quarter University</td>
<td>99999997-01 Pheaa Quarter University</td>
<td>99999997-01 Pheaa Quarter University</td>
<td></td>
</tr>
<tr>
<td>Program of Study: Registered Nursing Program</td>
<td>Registered Nursing Program</td>
<td>Registered Nursing Program</td>
<td></td>
</tr>
<tr>
<td>Award Date: 09/13/2013</td>
<td>09/13/2013</td>
<td>09/13/2013</td>
<td></td>
</tr>
</tbody>
</table>
STEP 2: SELECT FILE AND PRINT PREVIEW

WARNING! NOT FOLLOWING STEPS WILL RESULT IN MULTI PAGES
STEP 3: REDUCE PRINT SIZE
RESULT: FORMATTED TO ONE PAGE

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

- Delivers to page on Doc Library
- Does not open app
Other Updates

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

- Displays ‘System’ instead of blank if update was a program
- Displays Period
  - Display Activity for All Years
  - No Arrow if no detail
Other Updates

**SPECIAL REQUEST**

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

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

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

- 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
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.

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

pheaa.org/training
QUESTIONS
Contact State Grant and Special Programs staff:

- Email: 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)