Alec (School Portal)

Please visit Content Connection for the most recent version of this document.
## Change Control

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<th>Responsible Individual</th>
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| Version 2.0 | February 2015  | CR 021247-01W – Remove Meteor link  
New cover template                              | Melissa Leshko           |
| Version 2.1 | July 15, 2015   | CR 021333-01W – Remove OneLINK GUI link, reference account access and search options | Melissa Leshko           |
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| Version 2.4 | June 14, 2016   | CR 024019-01W – privacy policy and terms of use                               | Melissa Leshko           |
| Version 2.5 | October 28, 2016 | Update home page for Sterling File Gateway link                                | Melissa Leshko           |
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**Introduction**

Alec, formerly known as School Portal, allows school users to access online financial aid management tools and student financial aid reports conveniently through a secure and comprehensive Web site.

Features that are displayed on the home page vary from school to school depending on the school’s preferences and access authority. For example, remote schools do not have access to Alec and so do not see the Alec logo or its features, such as loan certification. The appropriate AES school representative can provide information as to what is available to a remote school. This user guide will reflect what is available to a Pennsylvania school.

**NOTE:** For non-Pennsylvania schools, this tool is still known by its original name “School Portal.”

The following features are available on Alec:

- Access current communications from American Education Services (AES)
- Access loan processing features, including viewing real-time processing, processing loans and accessing AES systems
- Access standard reports via PageCenter
- Access financial aid services
- Send and receive file transmissions
- Access student accounts
- View State Grants and Special Programs
- Order program materials
- View training information, user documentation, publications and manuals
- Access default prevention tools
- Access Education Planner

**System Requirements**

School users must have one of the following in order to use Alec:

- Internet Explorer 5.5 or greater
- Netscape 6.2 or higher
- Firefox 1.0 or greater
Access Alec

This section describes how to access the home page for Alec.

1. Enter the Web site www.aessuccess.org in the Web browser.

The American Education Services home page displays.

2. Click the Alec partner access tab.
The login box displays.

A school user must login to Alec with a RACF ID and password in order to access its features. A school user can obtain a RACF ID and password from a client representative. Access to the Alec login is also possible by clicking on **Financial Aid Products & Support for Schools** in the navigation pane on the left.

3. In the **Username** field, enter the RACF ID.

4. In the **Password** field, enter the password.

5. Click **Sign In**.
The **Welcome to AES School Portal** page displays.

Users are required to agree to the terms of use each time they sign in.

6. Click **Yes, I Agree** to continue.
The **Welcome to AES School Portal** page redisplay.

7. Refresh the token device.

8. In the **Security Code** field, enter the six-digit security code that was generated by the token device.

   **NOTE**: Users who have registered a token but do not have it available can request a temporary security code. Click **I don't have my Token with me**. See user guide **WB0120-Web Login & Authentication for Partners_User Guide_AES** for more information.

9. Click **Submit**.
The **Application Selection** screen displays.

10. Click **SCHOOL PORTAL Alec for Schools**.
The **Alec** home page displays.
Navigation Links

The Alec home page contains various navigation links. Links normally appear at the top and/or bottom of a screen. However, some may appear as tabs on the page.

The Alec home page displays showing links at top:

![Navigation Links Image]

Contact Us and Logout links are available at the top right corner of the home page.

See WB0123-School Portal State Grant Partner Interface_User Guide_PHEAA if the Search Grants feature is available from the dropdown list at the top left corner of the home page. See WB0142-School Portal-Account View_User Guide_AES if the Search Loans feature is available from the dropdown list at the top left corner of the home page.

Home, State Grants and Loan Processing links display at the bottom of the Alec home page.
Logout

This link returns the user to the Login page.

Login

In order to continue, please enter a valid User Id and Password.

* User Id: [input field]

*Password: [input field]

- Forgot your password?
- Create an Account

The Login page displays the following links at the bottom of the page:

- Privacy Policy
- Terms of Use
Contact Us

This link displays the page for contact information.

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<th>Service</th>
<th>Toll-Free Call</th>
<th>Email</th>
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<tbody>
<tr>
<td>Password Resets for Schools</td>
<td>1-800-443-0646 Option 1 Monday through Friday, 7:00 AM to 7:00 PM (ET)</td>
<td><a href="mailto:helpdesk@aessuccess.org">helpdesk@aessuccess.org</a></td>
</tr>
<tr>
<td>Technical Support for Schools</td>
<td>1-877-398-4237 Monday through Friday, 7:00 AM to 7:00 PM (ET)</td>
<td><a href="mailto:helpdesk@aessuccess.org">helpdesk@aessuccess.org</a></td>
</tr>
<tr>
<td>Access Agreements and Requesting Access (BPAMS)</td>
<td>1-800-443-0646 Option 2 Monday through Friday, 8:00 AM to 5:00 PM (ET)</td>
<td><a href="mailto:phEAAccess@phcaaa.org">phEAAccess@phcaaa.org</a>, <a href="mailto:ESCAccess@phcaaa.org">ESCAccess@phcaaa.org</a></td>
</tr>
<tr>
<td>PA State Grant and Special Programs</td>
<td>1-800-443-0646 Option 3 Monday through Friday, 8:00 AM to 5:00 PM (ET)</td>
<td><a href="mailto:sghelp@phcaaa.org">sghelp@phcaaa.org</a>, <a href="mailto:NETS@phcaaa.org">NETS@phcaaa.org</a>, <a href="mailto:matchingfunds@phcaaa.org">matchingfunds@phcaaa.org</a></td>
</tr>
<tr>
<td>Loan System and Product Support</td>
<td>1-800-443-0646 Option 4, Option 1 Monday through Friday, 7:30 AM to 4:30 PM (ET)</td>
<td><a href="mailto:onelinkservices@aessuccess.org">onelinkservices@aessuccess.org</a></td>
</tr>
<tr>
<td>Financial Aid Services System and Product Support</td>
<td>1-800-443-0646 Option 4, Option 2 Monday through Friday, 8:00 AM to 5:00 PM (ET)</td>
<td><a href="mailto:dataLink@aessuccess.org">dataLink@aessuccess.org</a></td>
</tr>
<tr>
<td>Default Prevention</td>
<td>1-800-328-0355 Monday through Thursday, 9:00 AM to 9:00 PM (ET) Friday, 8:00 AM to 7:00 PM (ET)</td>
<td><a href="mailto:defprev@aessuccess.org">defprev@aessuccess.org</a></td>
</tr>
<tr>
<td>AES Student Loan Servicing Center</td>
<td>1-800-233-0857 Monday through Friday, 7:30 AM to 9:00 PM (ET)</td>
<td><a href="mailto:aescs@aessuccess.org">aescs@aessuccess.org</a></td>
</tr>
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</table>
Privacy Policy

The Privacy Policy link is at the bottom of the login page. This link displays the Privacy Policy page with links to view the PHEAA Privacy Policy for Gramm-Leach-Bliley Act (GLBA) and the PHEAA Online Privacy Policy in PDF format.
Terms of Use

The Terms of Use link is at the bottom of the login page. This link displays the Online Services Terms of Use page with a link to view the Online Services Terms of Use in PDF format.
Online Tools

A school user can login to access the following online tools from the Alec home page:

- Messages
- Alerts
- Loan Processing
- Reports
- Student Accounts
- Financial Aid Services
- State Grants & Special Programs
- Order Materials
- Training & Publications
- Default Prevention
- Link to Education Planner.org

The following pages describe each of these online tools in detail.
**Messages**

The message area is provided as a communication tool from AES to the schools.

On the Alec home page, the message box displays messages for the school.
**Alerts (Notifications)**

The right side of the page displays **Alerts (Notifications)** for any alerts or notifications that are specific to the school.

1. If the school has exported student lists or reports, the user can click **View My Exports** to view a list of reports that were exported.
The **My Exports** page displays.

This page displays lists of exported files for Requests in Progress, Requests Ready to Download and Requests That Have Been Downloaded. No exports are shown on the page above.

2. Double-click a file link that is ready to be downloaded or has been downloaded in order to open the file.
State Grants

This section provides links to PageCenter for reports, information on state grant and special programs, a mass update queue and a form for submitting education costs used for determining grant awards.

On the Alec home page, these features (in red below) are located below the message box.
See the Reports & Files – PageCenter section below to access the link to PageCenter for weekly updates and roster reports.

See the WB0123-Grants Partner Interface_User Guide_PHEAA document for more information about the links to View State Grants Dashboard, Create Mass Update Queue, Request Primary School Change, View My Exports and State Grant Disbursement Certification.

To access the Education Cost Form, use the steps in the next section.
Educations Cost Form

1. In the **State Grants** section, click **State Grant Education Costs**.

   ![Screenshot of Alec portal](image)

   The **Educational Costs Online Form** page displays.

2. In the **PHEAA Code** field, enter the six-digit PHEAA code assigned to the user.

3. Click **Continue** to access the form and complete the education costs information.
Loan Processing

This section provides access to the following features:

- OC/Webconnect
- Account Access

On the Alec home page, these features are located below the State Grants section or below the Alec logo.
OC/Webconnect

OC/Webconnect allows the user to directly access information on several AES systems. The Financial Aid Services System link may be available, depending on the school user’s access:

**NOTE:** Schools may access various mainframe transactions to view and sometimes update loan information on the AES systems.

1. On the Alec home page, click **Direct Access to the AES System** under the **Loan Processing** section.

![Loan Processing](image)

The **AES Connect** page displays.

![AES Connect](image)

The following versions of browsers are supported when communicating with AES’s mainframe through AESCONNECT: Internet Explorer 5.5 and above, Netscape 4.07 and above. Browsers running Sun Java will bring up a second window that should be minimized, do not shut it down while running AESCONNECT.

See **WB0094 – OC.WebConnect_User Guide_AES** for information on OC/Webconnect.
Account Access

This feature allows the school user to access a student’s or borrower’s account to perform the following tasks:

- Make an online payment for a student
- View the payment history for a student
- Update the personal contact information for a student

1. In the Loan Processing section, click View Students AES Accounts.

### Loan Processing

- View Students AES Accounts
  - Account Access
- Direct Access to the AES System
  - OC/Webconnect
The **SSN/DOB Entry** page displays.

2. Enter the borrower’s or student’s nine-digit Social Security number in the SSN field. *This field is required.*

3. Enter the borrower’s or student’s date of birth in mm/dd/yyyy format in the Date of Birth field. *This field is required.*

4. Click **Sign In**.

See **WB0007 – Consumer Portal_User Guide_AES** for information about accessing a student or borrower loan account.
Reports & Files

This section provides access to the following report features:

- Page Center
- Loan Counseling Reports
- Sterling File Gateway (Beta)

On the Alec home page, these features (in red below) are located below the Loan Processing or State Grants sections.
PageCenter

PageCenter is an online report viewing and printing software that allows users to access reports in a secure manner. It includes disbursement, guaranty, Pell processing, need analysis, and Pennsylvania State Grant reports. CommonLine schools can use PageCenter as a supplement to their processing software to maintain up-to-date information on the loan process.

PageCenter provides useful features such as:

- Saving a report to a PC to import into a FAMS system or Excel spreadsheet
- Search features
- Customization of data
- Online help
- Easy printing options

1. In the **Reports & Files** section, click **Standard Reports**.
The **PageCenter Web Access** page displays.

See [WB0005 – PageCenter_User Guide_AES](#) for information on using PageCenter.
Loan Counseling Reports

This feature enables the user to review student entrance and exit counseling session reports. This is available for schools that use Online Entrance and Exit Counseling.

1. In the Reports & Files section, click Loan Entrance/Exit Counseling.

The Online Loan Counseling login page displays.

2. Enter the school code and click Continue to view reports for the school.
Send & Receive Files

This feature allows users to share and transfer files between agencies through secure mailboxes. Users can upload to and download from only those mailboxes to which they have access.

1. In the Reports & Files section, click Send & Receive Files.

The My File Gateway home page displays.

To search, upload or download files, see the procedure IN0393-My File Gateway for School_User Guide_PHEAA for more details.
Order Materials

This section is used by schools to order Stafford and PLUS program materials to distribute to students. On the Alec home page, this section is located below Profile Maintenance.

1. Click Program Materials.
The **Materials to Guide Planning for Higher Education** page displays.

Training & Publications

In this section, the following features are available to schools:

- Training Event Schedule
- Document Library
- Loan Notes
- Common Manual

On the Alec home page, this section is located below Order Materials.
Training Event Schedule

This feature allows a school user to view upcoming training events conducted by AES or business partners in the community. The training sessions are open to all Financial Aid Professionals at postsecondary institutions.

1. In the **Training & Publications** section, click **Training Event Schedule**.

### Training & Publications

- **Training Event Schedule**
  View upcoming training opportunities offered by AES.
- **Document Library**
  View documentation on products, systems, and services.
- **Loan Notes**
  Access AES publications on FFELP news.
- **Common Manual**
The **Training Events** page displays.

2. Click on any highlighted training session link to view more information about the session.
Document Library

This feature allows a school user to view documentation on products, systems and services. Adobe Acrobat Reader is required to view the documents.

1. In the **Training & Publications** section, click **Document Library**.

![Training & Publications]

- **Training Event Schedule**
  View upcoming training opportunities offered by AES.
- **Document Library**
  View documentation on products, systems, and services.
- **Loan Notes**
  Access AES publications on FFELP news.
- **Common Manual**
The **AES Document Library** page displays.

2. Click the desired highlighted link in the left navigation pane to view a list of documents for the selected topic.
Loan Notes

This feature links the school user to a monthly publication pertaining to agency, industry and Federal Family Education Loan Program (FFELP) related news. The school user can open, view and print a copy of the publications. Adobe Acrobat Reader is required to view the documents.

1. In the Training & Publications section, click Loan Notes.

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<tr>
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<tr>
<td>Training Event Schedule</td>
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</tr>
<tr>
<td>Access AES publications on FFELP news.</td>
</tr>
<tr>
<td>Common Manual</td>
</tr>
</tbody>
</table>
The **PHEAA Industry Bulletin (Formerly Known as Loan Notes)** page displays.

2. Click the highlighted publication link to view the contents for the desired Loan Notes issue.
Common Manual

This feature provides a link to the Common Manual and related information. The Common Manual is a repository of policies compiled by guaranty agencies to regulate the guaranty, origination and servicing of FFELP loans. Adobe Acrobat Reader is required to view the documents.

1. In the Training & Publications section, click Common Manual.

Training & Publications

Training Event Schedule
View upcoming training opportunities offered by AES.

Document Library
View documentation on products, systems, and services.

Loan Notes
Access AES publications on FFELP news.

Common Manual
The **Common Manual Information** page displays.

2. Click the highlighted link to open the desired document.
Default Prevention

This section provides a link to the youcandealwithit.com Web site and a link to access tools in this site.

On the Alec home page, the Default Prevention section (in red below) is located below Training & Publications.
You Can Deal With It

This feature provides a link to a financial management Web site for school advisors to use when assisting student loan borrowers in managing educational loan debt.

1. In the **Default Prevention** section, click **You Can Deal With It**.

The **youcandealwithit.com** Web site displays.

2. Click the desired link (posted note) in the left navigational pane.
YCDWI Downloads

This feature provides a link to the tools and calculators for the youcandealwithit.com Web site.

1. In the **Default Prevention** section, click **YCDWI Downloads**.

   ![](image)

   **Default Prevention**
   
   **You Can Deal With It**
   Access a financial management website designed to assist student loan borrowers with managing debt.
   **YCDWI Downloads**
   Access calculators, tools and downloads to assist student borrowers with financial management.

   The **Tools & Calculators** page displays.

   ![](image)

   **Calculators and Resources**
   
   - **Calculators**
     Use our online calculators to see how your financial choices can affect your bottom line.
   - **Personal Stories**
     Read about how others are dealing with their student loan debt.
   - **Other Online Resources**
     Visit these helpful websites for more information on budgeting and financial planning.

2. Click the highlighted link to access the desired calculator or tool.
**EducationPlanner.org**

This section provides a link to access a career and college planning Web site for school advisors to use when assisting students with career selection and planning for college.

On the **Alec** home page, this feature is located below **Default Prevention**.

1. On the bottom right of the **Alec** home page, click **EDUCATIONPLANNER.org**.
The **EducationPlanner.org** Web site displays.

2. Click any highlighted link to access additional tools and information available on the Web site.