PA State Grant & Special Programs 
Technical Resource Guide
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Introduction

A key requirement for organizational (i.e., institutional, employer, and partner) participation in the federal and Commonwealth funded programs administered by the Pennsylvania Higher Education Assistance Agency (PHEAA) is the appropriate use of PHEAA's technical resources to view and manage non-public, personal information or NPPI. This document is designed to provide users with a fundamental explanation of the online tools required to manage PA State Grant and Special Programs (SGSP) and guide beginners through gaining and maintaining access to these secure resources. Additional materials (e.g., User Guides, transaction cards, etc.) created to assist users with these online tools are available in the General SGSP Resources and program-specific sections of PHEAA.org/SGSPresources. SGSP programs which require remote access include:

- PA State Grant Program
- PA Act 101 (Act 101) Program
- PA Blind or Deaf Beneficiary Higher Education Beneficiary Grant (BDBG) Program
- Chafee Education and Training Grant (Chafee ETG) Program
- PA National Guard Educational Assistance Program (EAP)
- PA Institutional Assistance Grant (IAG) Program
- PA Partnerships for Access to Higher Education (PATH) Program
- PA Targeted Industry Program (PA-TIP)
- PA Ready to Succeed Scholarship (RTSS) Program
- PA State Work-Study Program (SWSP)
- PHEAA Federal Work-Study - On-Campus (FWS-ON) Program
- PHEAA Federal Work-Study - Community Service (FWS-CS) Program
- PA National Guard Military Family Education Program (MFEP)
- PA Fostering Independence Tuition Waiver (FosterEd) Program

Program Guidelines and other policy documents for these programs can be found on PHEAA.org/SGSPresources and in the Document Library. Contact PHEAA with any questions on SGSP policy, procedure, and the appropriate use of the technical resources for program administration.
Remote Access Agreement & Authoritative Source

New Participants

Upon initiating the steps for participation in a PHEAA-administered program, all new institutions, employers, and other community partners will be forwarded a Remote Access Agreement (RAA) and Authoritative Source (AS) Form. Signed by an authorized official, the RAA contractually obligates the organization to abide by the terms and conditions for using PHEAA systems. Branch campuses and third-party servicers may need to complete separate agreements to gain access to PHEAA online tools. In completing the AS Form, the organization designates one or more Authoritative Sources who will serve as the point of contact and manage user-level access for all users at the organization. The designated AS may be members of the organization or members of a parent organization, as appropriate. Submission of both the RAA and the AS Form is required in order to access PHEAA’s online tools.

Existing Participants

Organizations with an existing RAA and AS on file may need to complete a new RAA in situations when changes impact program participation. These situations include, but are not limited to, staffing changes, changes in ownership, new Employer Identification Number (EIN), or new federal Office of Postsecondary Education Identification (OPE ID) code. Organizations should consult the applicable Program Guidelines for how to report these changes to PHEAA.

In cases when a participating organization needs to replace one or more AS on file, an authority at the organization should contact PHEAA to complete a new AS Form. If members of an organization desire to know who currently serves as the organization’s AS, this information can be found in the Business Partner Access Management System (BPAMS). Users may also contact PHEAA for additional RAA and AS information.

Copies of the RAA and AS forms are available on PHEAA.org/RAA.
Overview

The Business Partner Access Management System (BPAMS) is a database and Web interface that is designed to manage access to PHEAA systems. With this application, business partner representatives may request access to PHEAA online resources. Additionally, the AS can submit, approve, deny, and cancel requests, as well as perform access reviews and terminate user profiles for users who no longer require access.

Access Requests

Access Options managed by BPAMS are user specific and vary depending on the type of institution or organization, program participation, and role(s) the individual selects during the questionnaire (e.g., high school, non-school employer, etc.). Request options may also be specific to the level of access (e.g., parent to child, branch campus, etc.) of the organization itself. Users should be sure to only select the options specific to their performance of duties associated with the specific programs they administer. The sharing of individual user credentials is prohibited.

Users can access the BPAMS homepage and select whether to log in with an existing username and password or open the New User tab. When logging in, an existing user, AS included, will be provided with navigation options for submitting requests and updating existing access (including their own), as well as the option to submit new user access requests. New staff may have an existing user from their organization submit a request on their behalf or access BPAMS themselves and select the New Profile tab to initiate their own request.
Access Options

After completing the fields at the top of the Contact Information section of the profile, the user will be asked to select an option that best describes their organization. This selection is the first step in narrowing the access options provided to the user. Users requiring SGSP-related access will select “I work for a High School, Post-Secondary School, Employer, or Partner.”

Once the organization type is selected, the user will need to select the type of SGSP access needed based on their role at the institution or organization.

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Options</th>
</tr>
</thead>
</table>
| I work for a postsecondary school and I do NOT work with Financial Aid but require access to Special Programs (Work-Study) | **Matching Funds Employer Access** – Needed for access to view Matching Funds PageCenter reporting and to view (inquire) and add/update SWSP student applications and hours worked via OC/WebConnect  
**PageCenter** – Needed to view PA State Work-Study reporting  
**Web File Transmission** – Needed to submit SWSP hours worked and upload other files via My File Gateway |
| I work for a postsecondary school and require access to FedLoan Servicing, Financial Aid Services, Loan Processing, PageCenter, PA State Grant and Special Programs or FedLoan Consolidation information | **Reports (School Reports)** – Needed to view student/institution-level PageCenter reporting, select the appropriate program:  
- **EAP** – Includes both EAP and MFEP reports  
- **Grants (IAG, PA-TIP, PA State Grant)** – Includes BDBG, IAG, PA State Grant, RTSS, and PA-TIP reports  
- **NADL** – Includes Act 101 reports  
- **STEP (CHAFEE, GEAR UP, PATH)** – Includes Chafee, PATH, and FosterEd reports  
- **Work-Study** – Includes FWS-ON, FWS-CS, and SWSP reports  
**School: PA State Grant & Special Programs (Financial Aid Administrators)**  
- **Matching Funds Financial Aid Access (Schools)** – Needed to access Matching Funds PageCenter reporting and to view or update SWSP student applications and hours worked via OC/Webconnect  
- **PA State Grant System including NETS and PA-TIP** – Needed to access PageCenter reporting in the Grants Application, to view/update student records via Partner Interface, to view student/institutional records via OC/WebConnect for PA State Grant Program, RTSS, and IAG  
- **PA State Grant Educational Cost Update** – Needed to submit annual PA State Grant institutional cost information via Alec  
- **Web File Transmissions** – Needed to upload and download secure files via My File Gateway for multiple SGSP programs, including PA State Grant Transmissions, SWSP hours worked, and files for Act 101, EAP, Chafee, etc. |
<table>
<thead>
<tr>
<th>Role</th>
<th>Access Options</th>
</tr>
</thead>
</table>
| I work for a company/non-profit organization and require access to Work-Study | **Employer:**  
  - Matching Funds Employer Access – Needed to view or update SWSP student applications and hours worked via OC/WebConnect  
  - PageCenter – Needed to view PA State Work-Study reporting  
  - Web File Transmission – Needed to submit SWSP hours worked and upload other documents via My File Gateway |
| I work for an organization and require access to PageCenter for GEAR-UP, CHAFEE, or PATH programs | **Programs:**  
  - PageCenter – Needed to view STEP PageCenter reporting  
  - STEP – Needed for accessing STEP student data and PageCenter reporting  
  - Web File Transmission – Needed to submit PATH nominations and other documentation via My File Gateway |

**Request Approval, Usernames, & Passwords**

User access must be approved and request submissions will prompt PHEAA to contact the Authoritative Source, PHEAA’s SGSP Staff, and PHEAA’s Enterprise Security Office (ESO) to review and approve the request. In cases when the AS requests access for a user, approval will only be required by PHEAA staff.

Once access has been granted via BPAMS, a username and temporary password will be issued within 1-3 days via two separate emails. The first time a user logs on, they will be required to enter a new password into the “Enter New Password” and “Verify New Password” fields using the following rules:

- Passwords must be exactly eight characters in length.
- The first character must be a letter; the second character must be a number; and the remaining six characters can be any combination of letters and numbers.
Users must access the online tools at least once every 90 days to maintain activity for the user ID. If the ID becomes inactive, please contact our Help Desk at 800-443-0646, and select Option 1 to have your user ID reinstated. For purposes of security, passwords expire after 90 days and, when logging in, the user will be prompted to make the change (password rules are applicable). Additionally, a user cannot repeat any of the 10 previous passwords when creating a new password.

Additional information on the BPAMS technical functionality is available in the BPAMS User Guide.

**Access Maintenance**

User profiles (including usernames and passwords) will be terminated after a year of inactivity. All users, including the organization’s AS, must maintain access by logging into PHEAA’s online tools at least once a year. To confirm the accuracy of external user access, PHEAA requires the AS to conduct an annual review of all users. When the review is not conducted, all access within the organization will be suspended until the review is complete. Please note that PHEAA may not prompt or know to prompt institutions to take all the necessary steps to maintain their access. It is the institution’s responsibility to request and maintain user access, as well as to reach out to PHEAA if a new user or new AS is needed.

Users having difficulty logging into or using a PHEAA online tool should contact PHEAA at 1-800-443-0646, Option 1, or email sgsp_bpams_processing@pheaa.org.

PHEAA also produces a BPAMS User Guide for Requestors which contains information on how to launch the system, log in, and make requests.
Overview

Alec, also referred to as the Partner Portal or the School Portal, allows school users to access online financial aid management tools and student financial aid reports conveniently through a secure and comprehensive website. Access to the portal for all organizations can be found in the For Schools/Lenders selection of the Sign In drop-down on PHEAA.org. Alec can also be launched via sfweb.pheaa.org.

Accessing the Portal

Once access to the portal has been granted through the BPAMS process, a user may sign into Alec with their user ID and password. Logging in to Alec will require a user to agree with the terms of use. If the access granted includes viewing federal data, users will be prompted to enter token information. The federal token page does not display for SGSP-only user access.

After signing in, the user will choose an option from the Application Selection display. The applications featured on this page will vary depending on the organization’s preferences and access authority. For instance, a community partner user participating in the PATH Program may only view the BPAMS, My File Gateway, and PageCenter options, whereas user options for a postsecondary institution could also include the School Portal and Document Library.
It is recommended that users at postsecondary institutions requiring review of multiple applications at once should select the School Portal option for single sign-on navigation. Links listed in the center and sidebar sections of the School Portal landing page will allow the user to access multiple applications (e.g., PageCenter, My File Gateway, etc.). The BPAMS option is currently not available via the School Portal landing page and must be selected using the Application Selection radio buttons (above). When selecting the School Portal, the user is presented with multiple navigation options and a Student Social Security Number Search.

A User Guide explaining Alec functionality is available in the SGSP resources page on PHEAA.org.
Overview

PageCenter is a licensed web-based report repository used by schools, employers, and other PHEAA business partners to access reports, called Pagesets, via a secure web server. PageCenter allows authorized users to view, print, and save pagesets, as well as email NPPI, or convert it to an alternative format. To access PageCenter, select the “View Reports” radio button on the Alec Application Selection menu. Users with single sign-on access can also launch PageCenter via a link on the landing page of the Alec School Portal. Save and print functionality may be limited when using certain web browsers (e.g. Safari, Chrome, etc.). The platform was created to be launched via Internet Explorer (IE). Users without IE access may launch PageCenter in Internet Explorer Mode of Microsoft Edge. Compatibility Directions are available at PHEAA.org/SGSPresources.

In PageCenter, reports required to manage the program (e.g., annual applications, disbursement rosters, Applicant Certification and Status Listings, etc.) are provided in an organization’s mailbox. Each mailbox contains applications, or report groupings. User access to mailboxes and applications will depend on a user’s role in managing PHEAA-administered program information as determined through the BPAMS request approval process. The breakdown for PageCenter applications is as follows:

<table>
<thead>
<tr>
<th>Application</th>
<th>SGSP Program(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GRANTS</td>
<td>BDBG, IAG, RTSS, PA-TIP, and PA State Grant</td>
</tr>
<tr>
<td>NADL</td>
<td>Act 101</td>
</tr>
<tr>
<td>NGEAP</td>
<td>EAP and MFEP</td>
</tr>
<tr>
<td>STEP</td>
<td>PATH, Chafee, and FosterEd</td>
</tr>
<tr>
<td>WORKSTDY</td>
<td>FWS-CS, FWS-ON, and SWSP</td>
</tr>
</tbody>
</table>

In order to remain in compliance with program deadlines, users can request an email notification when reports are issued to PageCenter by emailing the individual program inbox. Additional instructions on requesting PageCenter email notifications are available in the specific program guidelines.

Resources

Documents on PageCenter functionality are found on PHEAA.org/SGSPtraining. Resources include:

- Download PageCenter Plug-in Instructions
- PageCenter General FAQs
- PageCenter Document Restore Instructions
- PageCenter Masking Instructions
- PageCenter to Excel Instructions
- PageCenter to Word Instructions
- PageCenter User Guide
- SGSP PageCenter Reports Overview
My File Gateway

Overview

My File Gateway is a Web-based product that allows for the sharing and transferring of encrypted files between PHEAA and external organizations through secure mailboxes that provide controlled access to data. Users can access My File Gateway by logging into Alec and clicking on the appropriate radio button on the Application Selection display or via a link on the landing page of the School Portal.

Uploading & Downloading Files

Without requiring a significant level of technical experience, users can upload and download files using those SGSP program mailboxes to which they have access. Certain types of files uploaded by participating organizations (e.g., Applicant Certification or Waiver Listings, Nomination Lists, Disbursement Rosters, etc.) must be manually retrieved by PHEAA. However, for the SWSP, RTSS Program, and PA State Grant Program, data from pre-formatted transmission files can be pulled into the PHEAA mainframe systems to make updates to student records. To utilize the transmissions process, encryption software (e.g., .exe, .pgp, .zipx) and other security protocols may be required.

PHEAA regularly runs software that disposes of older files in My File Gateway mailboxes. Therefore, organizations should email the specific SGSP inbox when uploading or submitting files to PHEAA, informing staff that a file is available for retrieval. For the PA State Grant Program and SWSP, PHEAA will generate a PageCenter report detailing the requested changes and errors submitted through the transmissions processes.

Additional information on logging in and launching can be found in the My File Gateway User Guide. Transmission users may also receive additional instructions on how to manage the transmissions process directly from SGSP and ESO staff.
**Overview**

OC/WebConnect is a Java-based interface used to access the PHEAA mainframe via the Web. Access to OC/WebConnect is available via the Alec radio buttons or via the Alec School Portal landing page. As minimum system requirements are typically needed in order to utilize the features within OC/WebConnect, users may need to contact their organizational desktop support staff or someone with administrative rights for downloading applications, in case upgrades to their current software are required. An [OC/WebConnect User Guide](#) explaining the software required is available on the [SGSP Resources and Training webpage](#).

For the PA State Grant Program (RTSS included), OC/WebConnect is principally utilized by postsecondary institutions to view institution-level information (e.g., disbursements, refunds, etc.), but can also be used to view some student-level information for the program. OC/WebConnect is also the primary means for submitting student applications and hours worked for SWSP students, as well as viewing institutional data for IAG.

**Navigation & Hotkeys**

Navigation within the system is performed using specific display type-ins, also referred to as commands or transactions. Shortcut keys, also referred to as “hotkeys,” may also assist in navigation between displays. A list of [PA State Grant Transactions](#), including display codes used to manage the RTSS Program, is available on [PHEAA.org](#). For an explanation of SWSP transactions, a [Matching Funds Online System Guide](#), designed to assist users with navigating the system, can be located on the Resources webpage.
Overview
The Grants Dashboard (Partner Interface) is a Web portal that allows school users to manage PA State Grant Program student records on the Web. School users can search for, view, and update individual student records; view eligibility records; submit special requests when changes cannot be made on the portal; update multiple student records; and access and export student listings through the Grants Dashboard. School users can also utilize the PA State Grant Dashboard to make similar student-level changes for the RTSS Program, in addition to nominating potentially eligible student candidates and certifying student awards.

Resources
Resources are available to assist users in utilizing functionality, including:

- PA State Grant Partner Interface User Guide
- Partner Interface Filtering Tips
- Partner Interface Display Overview
- Ready to Succeed Partner Interface User Guide
Document Library

The Document Library is an online library that houses PA State Grant and Special Programs memoranda, technical resources (e.g. Transmissions Layouts, User Guides etc.), and various program materials.

Although some Document Library content is managed through the American Education Services (AES) division of PHEAA, SGSP content, (e.g., Institutional Applications, Act 101 Budget Template, etc.) can typically be found by accessing the PA State Grant and the Special Programs links on the sidebar. Some additional resources that are utilized to manage SGSP resources and other materials may also be located in the BPAMS, My File Gateway, OC/WebConnect, and PageCenter sections. To provide feedback regarding SGSP Document Library content, contact program staff.
Created in 1963 by the Pennsylvania General Assembly, the Pennsylvania Higher Education Assistance Agency (PHEAA) has evolved into one of the nation's leading student aid organizations. Today, PHEAA is a national provider of student financial services, serving millions of students and thousands of schools through its loan guaranty, loan servicing, financial aid processing, outreach, and other student aid programs.

PHEAA’s earnings are used to support its public service mission and to pay its operating costs, including administration of the PA State Grant and other state-funded student aid programs. As the only major federal loan servicer with a nonprofit public service mission, PHEAA devotes its energy and resources to help ease the financial burden of higher education for its primary stakeholders—Pennsylvania students and families.

PHEAA conducts its student loan servicing operations nationally as FedLoan Servicing and American Education Services (AES). PHEAA operates its digital technology division as Avereo. For more information, visit PHEAA.org.

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### Board of Directors

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<td>Chairman, Pike/Wayne</td>
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