

STATE GRANT
PROGRAM

**DISTANCE
EDUCATION
PARTNER
INTERFACE
USER GUIDE**

NOTES:



School Portal Distance Education Partner Interface

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School Portal Distance Education Partner Interface

Introduction

The State Grants Partner Interface is a Web portal that allows school users to manage Pennsylvania state grant student records on the Web, including participants in the State Grant Distance Education Pilot Program (SGDEPP). 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; request primary school changes; access the online Web certification; use mass update queues to update multiple student records; and access and export student listings through a state grant dashboard.

This user guide describes only the features of the Grants Partner Interface that pertain to the State Grant Distance Education Pilot Program. For complete instructions for using the State Grant Partner Interface for State Grants and the Ready to Succeed Scholarship Program, see user guides **WB0123-State Grant Partner Interface_User Guide_PHEAA** and **WB0139-School Portal Ready to Succeed Scholarship Partner Interface_User Guide_PHEAA**.

School Portal Distance Education Partner Interface

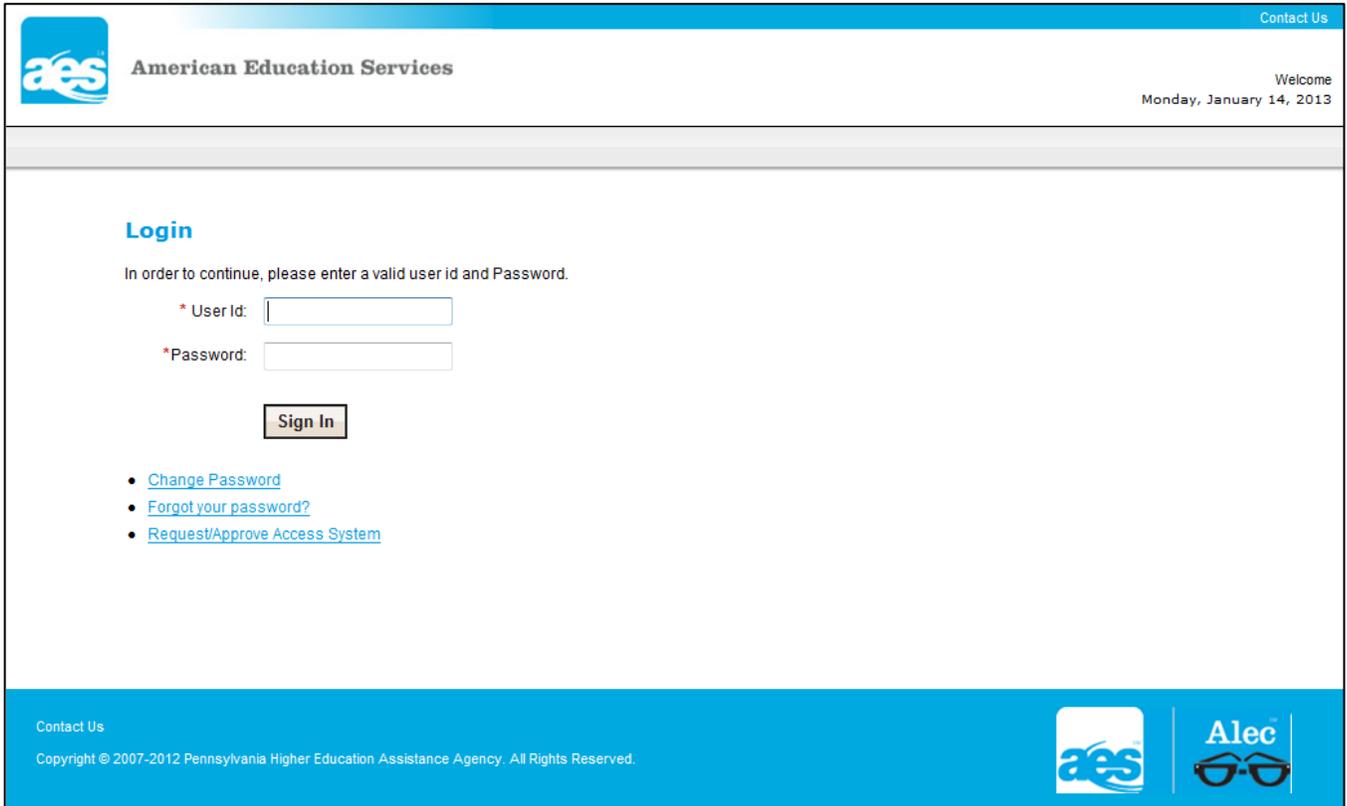
Accessing the State Grants Partner Interface



1. Open an Internet browser and enter the following URL:
<https://partners.aessuccess.org/B2BAuth/login.htm>
2. Press .

School Portal Distance Education Partner Interface

➔ The **Login** screen displays.



Contact Us

aes American Education Services

Welcome
Monday, January 14, 2013

Login

In order to continue, please enter a valid user id and Password.

* User Id:

* Password:

Sign In

- [Change Password](#)
- [Forgot your password?](#)
- [Request/Approve Access System](#)

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aes | **Alec**

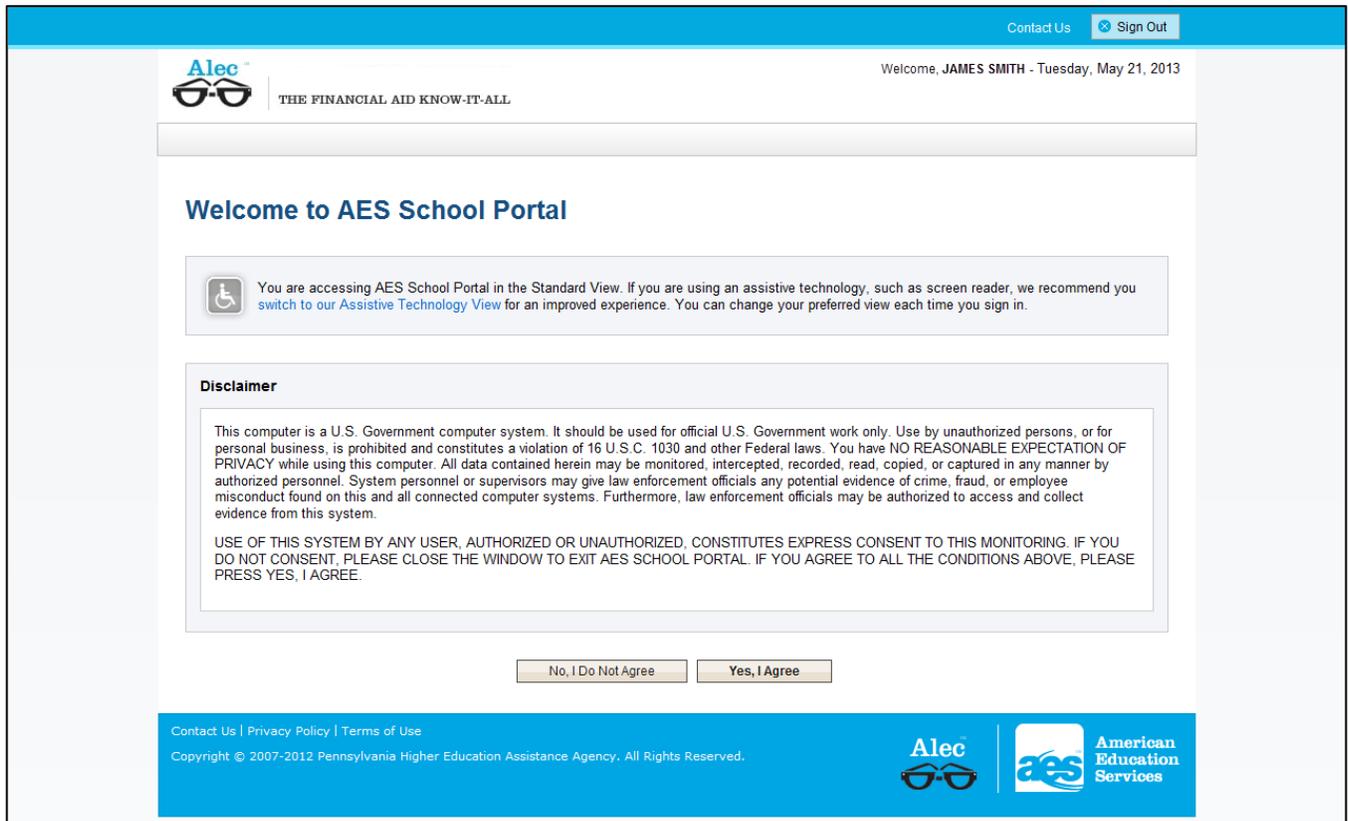
3. In the **User Id** field, enter a valid, PHEAA-assigned ID.
4. In the **Password** field, enter a valid RACF password.
5. Click **Sign In**.

NOTE: Links are available for password help and to take the school user to the Business Partner Access Management System (BPAMS) to request and approve access.

School Portal Distance Education Partner Interface

➔ The **Welcome to AES School Portal** page displays.

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



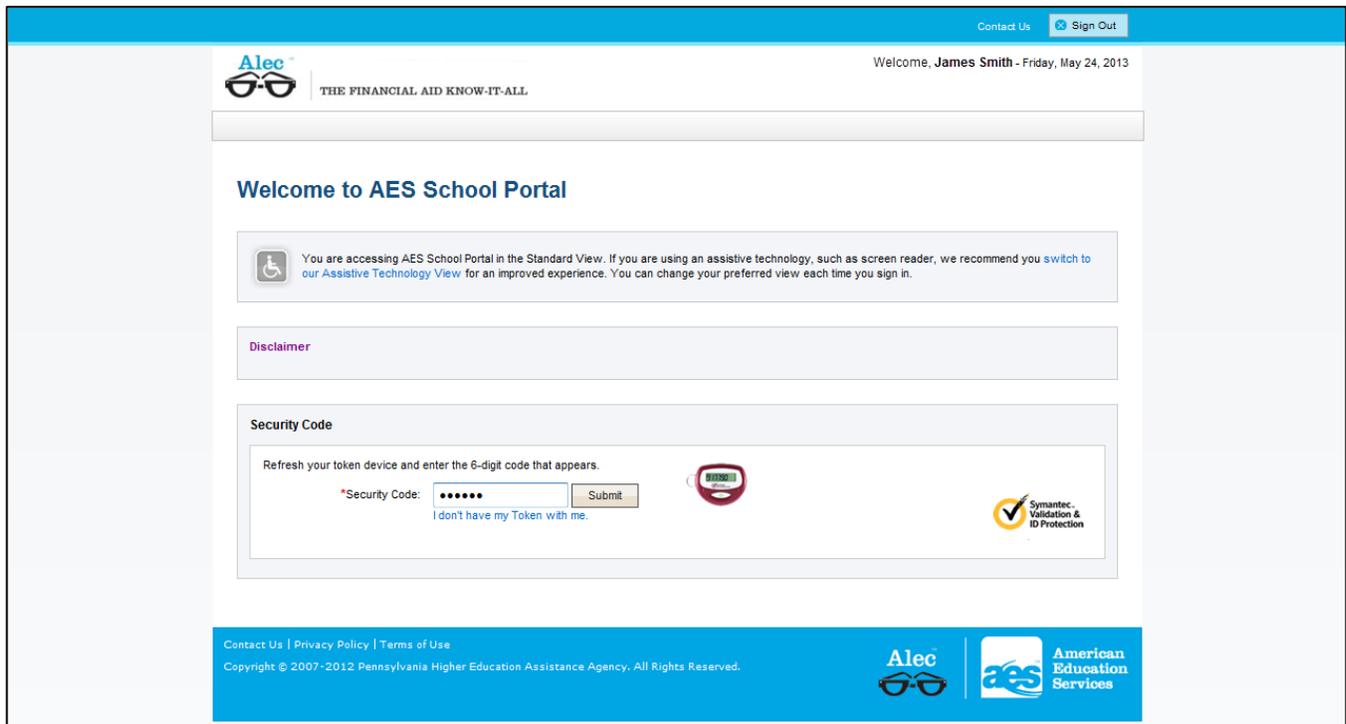
The screenshot shows the AES School Portal interface. At the top right, there are links for "Contact Us" and "Sign Out". Below this, a welcome message reads "Welcome, JAMES SMITH - Tuesday, May 21, 2013". The main content area features the Alec logo and the tagline "THE FINANCIAL AID KNOW-IT-ALL". A prominent heading says "Welcome to AES School Portal". Below this is a notice with an accessibility icon: "You are accessing AES School Portal in the Standard View. If you are using an assistive technology, such as screen reader, we recommend you switch to our Assistive Technology View for an improved experience. You can change your preferred view each time you sign in." A "Disclaimer" section follows, containing a detailed notice about U.S. Government computer system usage and consent. At the bottom of the disclaimer are two buttons: "No, I Do Not Agree" and "Yes, I Agree". The footer includes links for "Contact Us | Privacy Policy | Terms of Use", copyright information for the Pennsylvania Higher Education Assistance Agency, and logos for Alec and American Education Services.

6. Click **Yes, I Agree** to continue.

School Portal Distance Education Partner Interface

➔ The **Welcome to AES School Portal** page redisplay.

NOTE: Users will be prompted to enter a token only if they have access to federal data. This page does not display for school users with access only to State Grant information.



The screenshot shows the AES School Portal login interface. At the top right, there are links for "Contact Us" and "Sign Out". Below the navigation bar, the user is greeted with "Welcome, James Smith - Friday, May 24, 2013". The main content area features the Alec logo and the tagline "THE FINANCIAL AID KNOW-IT-ALL". A prominent heading reads "Welcome to AES School Portal". Below this, there is an accessibility notice with a wheelchair icon, a "Disclaimer" section, and a "Security Code" section. The "Security Code" section includes instructions to refresh the token device and enter a 6-digit code. It contains a text input field with six dots, a "Submit" button, a "I don't have my Token with me." link, a token device image, and a Symantec logo for "Symantec. Validation & ID Protection". The footer contains links for "Contact Us | Privacy Policy | Terms of Use", copyright information for the Pennsylvania Higher Education Assistance Agency, and logos for Alec and American Education Services.

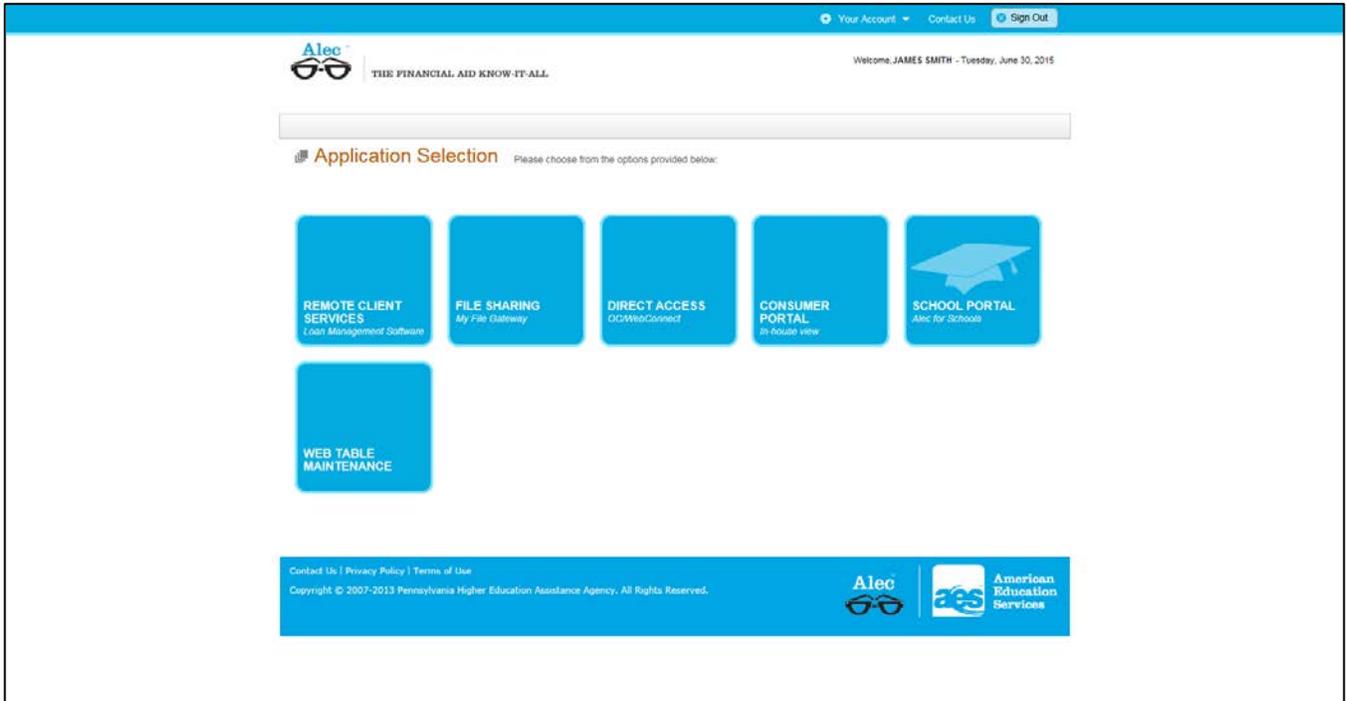
7. Refresh the token device.
8. In the **Security Code** field, enter the six-digit security code that was generated by the token device.

NOTE: Users who have registered a token but do not have it available can request a temporary security code.

9. Click **Submit**.

School Portal Distance Education Partner Interface

➔ The **Application Selection** screen displays.



10. Click **SCHOOL PORTAL Alec for Schools**.

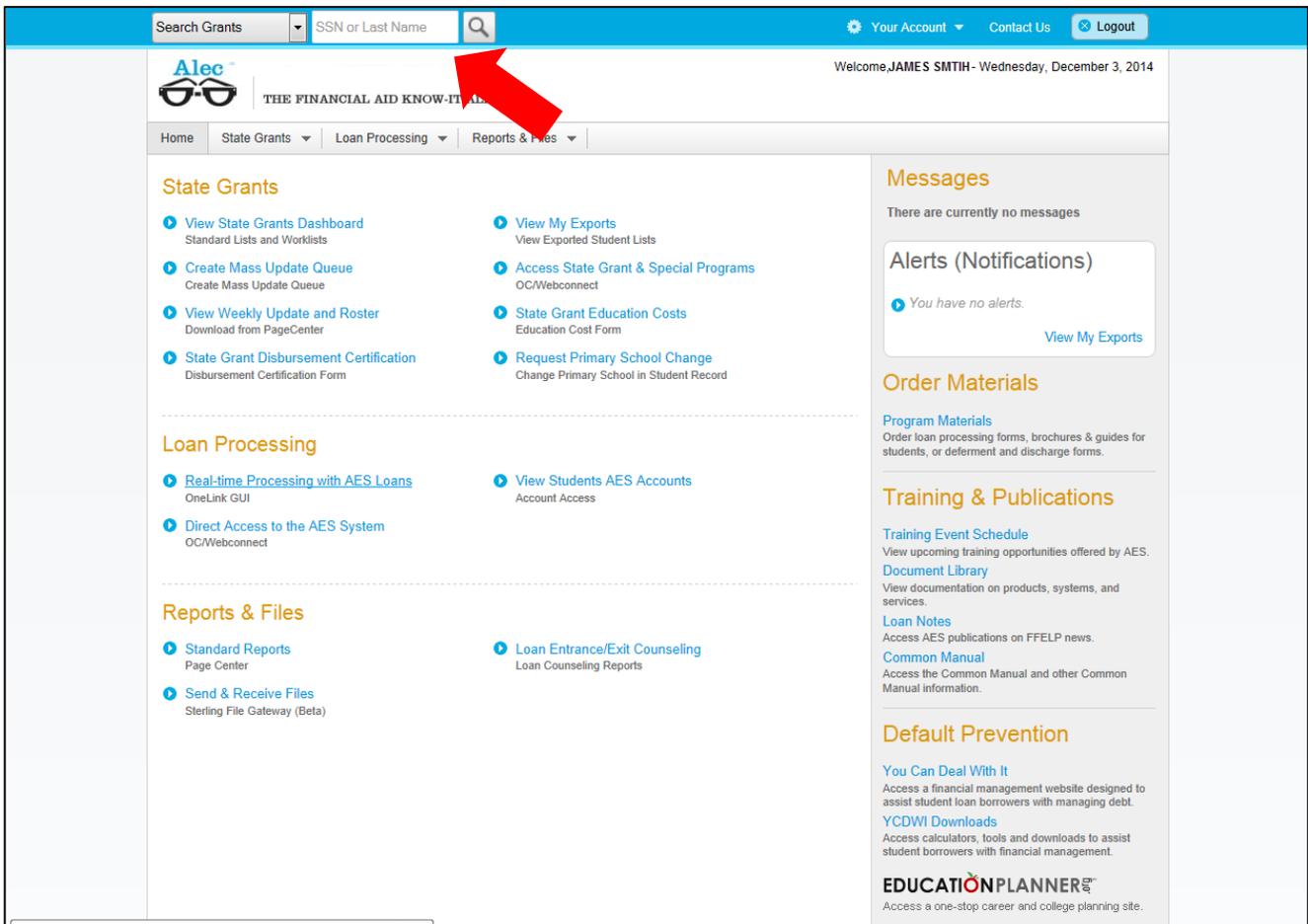
School Portal Distance Education Partner Interface

➡ The Alec school portal displays.

The screenshot shows the Alec school portal interface. At the top, there is a search bar for grants with a dropdown menu and a search icon. To the right, there are links for 'Your Account', 'Contact Us', and 'Logout'. Below the search bar, the Alec logo and tagline 'THE FINANCIAL AID KNOW-IT-ALL' are displayed. A navigation menu includes 'Home', 'State Grants', 'Loan Processing', and 'Reports & Files'. The main content area is divided into several sections: 'State Grants' with links for dashboard, update queue, weekly update, and disbursement certification; 'Loan Processing' with links for real-time processing and direct access; 'Reports & Files' with links for standard reports and file exchange; 'Messages' indicating no current messages; 'Alerts (Notifications)' showing no alerts; 'Order Materials' for program materials; 'Training & Publications' with links for event schedule, document library, and loan notes; and 'Default Prevention' with links for financial management and downloads. The footer of the page includes the 'EDUCATIONPLANNER' logo and a link to a career and college planning site.

Search for Students in the State Grant System

Search for students using the search field at the top of the portal.



Search fields at the top of the page allow school users to search for grants or loans.

1. To manage Pennsylvania State Grant student records for SGDEPP participants, click the down arrow in the first search field and select **Search Grants**.

NOTE: The drop down list does not display for school users with access only to State Grant information. In this case, only **Search Grants** displays.

2. In the second search field, enter the student's nine-digit Social Security number, 10-digit PHEAA account number, or last name. To use a wildcard search, enter the first three characters of the student's last name followed by an asterisk (*).
3. Click **Search**.



School Portal Distance Education Partner Interface

NOTE: If the most recent record for the student is prior to the 2007-08 academic year, the school user will be delivered directly to the student's Eligibility Record.

School Portal Distance Education Partner Interface

➡ The student's **Eligibility Summary** displays if the most recent record for the student is prior to the 2007-08 academic year.

Search Grants

Your Account Contact Us Log Out

Welcome, JAMES SMITH- Tuesday, April 26, 2016

Home | State Grants | Loan Processing | Reports & Files

Eligibility Summary: James Student

SSN: 123456789 ACCT#: 1234567890 SG Award Counter (Grand Total): 4

Last Update: 02/07/2009 Last User: FGXP5

Term Records	1998 - 1999 Fall	1998 - 1999 Winter	1998 - 1999 Spring	1998 - 1999 Academic Total
Halftime:	No	No	No	
School Name (OE Code):	00123400-01 College Name	-	00123400-01 College Name	
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	
SG Actual Award/Reject:	\$1,450		\$1,450	\$2,900
SG Remedial Exception:				0.0
SG Award Counters:	0.5	0.0	0.5	1.0
SG Academic Level:	1 - First Academic Year	-	1 - First Academic Year	
Cancellation Reason:				
Adjustment Reason:				
PHEAA EFC:				
High School Graduate:	Yes	Yes	Yes	

Period Records	1998-1999 Academic Year
Application Filed:	Yes
Total Family Contribution:	0
High School Grad Year:	1998
Veteran Status:	No
Financial Independent Status:	No
Inactivation Reason:	

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Alec American Education Services

School Portal Distance Education Partner Interface

➡ The **Search Results** page redisplay a list of accounts that match the criteria entered in the search field. This screen displays only if the school user searched by last name and the most recent record for the student is after the **2007-08** academic year.

Search Grants | SSN or Last Name | Your Account | Contact Us | Log Out

Welcome, JAMES SMITH - Thursday, October 23, 2014

Home | State Grants | Loan Processing | Reports & Files

Search Results for: student

Displaying 1 - 4 out of 4 Results

All Periods

Action	Student Name	SSN	Account #	D/O/B	Address	City	State
View Account	STUDENT, ABBY	123456789	1234567890		1200 NORTH MAIN STREET	HARRISBURG	PA
View Account	STUDENT, BETSY	123456789	1234567890		1200 NORTH MAIN STREET	HARRISBURG	PA
View Account	STUDENT, CAROL	123456789	1234567890		1200 NORTH MAIN STREET	HARRISBURG	PA
View Account	STUDENT, DAVID	123456789	1234567890		1200 NORTH MAIN STREET	HARRISBURG	PA

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pheslan.phesaa.org
Internet access

NOTE: Students display for all periods. To filter student records by academic year, click the down arrow and select the academic year.

4. To view a student's account, click the **View Account** link in the **Action** column.

School Portal Distance Education Partner Interface

➔ The **Student Record** page displays.

NOTE: Information for the most recent academic year is not displayed until PHEAA is ready to release estimated eligibility to school users. Generally, this occurs in February.

The screenshot shows the 'Student Record' page for 'Abbott W Student'. The page includes a navigation bar with 'Home', 'State Grants', 'Loan Processing', and 'Reports & Files'. The main content area displays student information, including SSN (123-45-6789), ACCT# (12-3456-7890), and SG Award Counter (2.42). Below this, there is a section for 'State Grant Eligibility' showing 'Fall: Grant Cancelled', 'Winter: \$1,138', and 'Spring: \$1,138'. A 'Special Messages' section is also present. At the bottom, there is a 'Grant Information' table with columns for Fall, Winter, Spring, and Academic Year Total. The 'DE Pilot Program' tab is circled in red.

	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:	10/29/2014	10/29/2014	10/29/2014	
Housing Status:	Off Campus	Off Campus	Off Campus	
Enrollment Status:	Full Time Student	Full Time Student	Full Time Student	
Award/Reject:	Grant Cancelled	\$1,138	\$1,138	\$2,276
Alternate Award (AA)	\$0	\$569	\$569	\$1,138
Enrollment Status for AA:	Part-Time	Part-Time	Part-Time	
Remedial Exception:				0.0
Award Counters:	0	0.33	0.34	0.67
Award Type:	Cancellation	Processed	Processed	
Cancellation Reason:	Student Not Enrolled	Student Not Enrolled	Student Not Enrolled	
School Adjustment Reason:				
PHEAA Adjustment Reason:				
Classroom Credits:				
Online Credits:				

- Click the **DE Pilot Program** tab to view Distance Education Pilot Program information. See [View Distance Education Pilot Program Information](#) for more information.

View Distance Education Information on the Student Record

The **DE Pilot Program** tab displays distance education information from the most recent academic year application on file or the selected academic year if a different one was selected. This tab displays when the primary school is approved to participate in the program and the student has been nominated by the school.

Distance Education Pilot Program			
	Fall	Winter	Spring
Nominated for Distance Education Pilot Award:	Yes	Yes	Yes
School Name (OE Code):	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University
CIP Code:	01.0302		01.0302
Program Structure:			
(Attempted) Classroom Credits:	8.00		14.00
(Attempted) Online Credits:			
(Actual) Classroom Credits:			
(Actual) Online Credits:			
Term GPA:			
Cumulative GPA:			
Primary Credential Completed:			
Term Tuition:			
Term Fees:			

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The **Nominated for Distance Education Pilot Award** field displays **Yes** if the student was nominated by the school for the Distance Education Pilot award.

The **School Name (OE Code)** field displays the eight-digit school code assigned by the Department of Education and the two-character suffix assigned by PHEAA, followed by the school’s name.

The **CIP Code** (Classification of Instructional Program) field displays the standard code assigned by the Department of Education to the program of study.

The **Program Structure** field displays the distance education composition of the student’s program of study: **100% online instruction**; **50% to 99% online instruction**; or **Less than 50% online instruction**.

The **(Attempted) Classroom Credits** field displays the number of credits the student is taking in a classroom.



School Portal Distance Education Partner Interface

The **(Attempted) Online Credits** field displays the number of credits the student is taking online.

The **(Actual) Classroom Credits** field displays the number of credits the student successfully completed in a classroom.

The **(Actual) Online Credits** field displays the number of credits the student successfully completed online.

The **Term GPA** field displays the student's grade point average for the term.

The **Cumulative GPA** field displays the student's total grade point average as of that term.

The **Primary Credential Completed** field displays the type of primary credential completed: **Bachelor's Degree, Associate Degree, Diploma** or **Certificate**. This field is populated for the final term when the credential is completed.

The **Term Tuition** field displays the tuition for the term.

The **Term Fees** field displays the fees for the term.

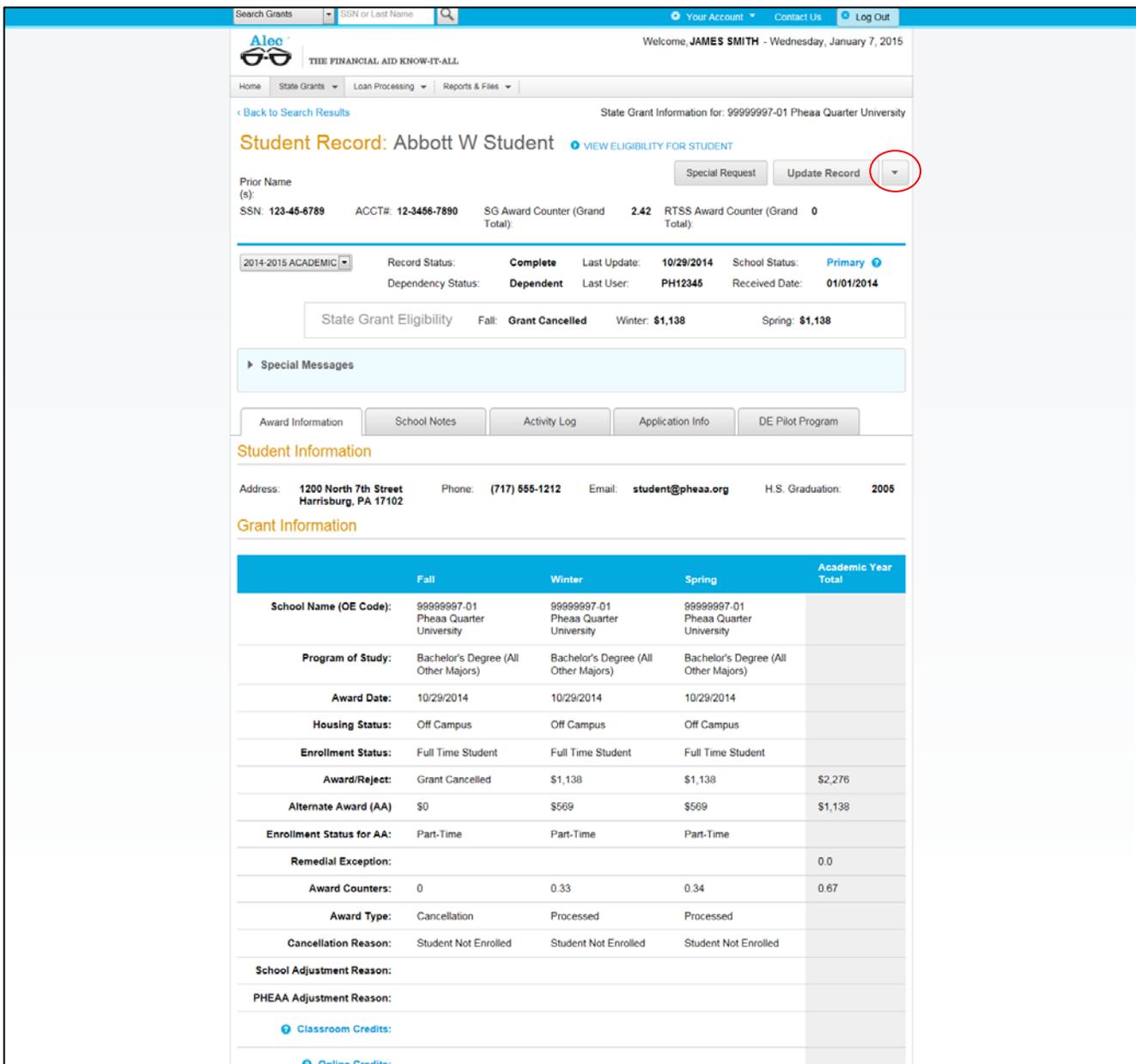
NOTE: School users can print the **Student Record** and the **DE Pilot Program** tab on one page. Select **File, Print Preview** from the Web browser. Reduce the print size to **50%** in order to keep the data on one page, then select **Print**.

School Portal Distance Education Partner Interface

Update Distance Education Information on the Student Record

The **State Grant Distance Education Pilot Program (SGDEPP)** update is used to nominate students for the Distance Education Pilot Program and to report distance education information.

NOTE: This section may be disabled if the latest academic year is not accessible because PHEAA is not ready to accept updates.



State Grant Information for: 99999997-01 Pheaa Quarter University

Student Record: Abbott W Student [VIEW ELIGIBILITY FOR STUDENT](#)

Prior Name (s):

SSN: 123-45-6789 ACCT#: 12-3456-7890 SG Award Counter (Grand Total): 2.42 RTSS Award Counter (Grand Total): 0

2014-2015 ACADEMIC Record Status: **Complete** Last Update: 10/29/2014 School Status: **Primary**
 Dependency Status: **Dependent** Last User: PH12345 Received Date: 01/01/2014

State Grant Eligibility Fall: **Grant Cancelled** Winter: \$1,138 Spring: \$1,138

Special Messages

Award Information School Notes Activity Log Application Info DE Pilot Program

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:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	
Award Date:	10/29/2014	10/29/2014	10/29/2014	
Housing Status:	Off Campus	Off Campus	Off Campus	
Enrollment Status:	Full Time Student	Full Time Student	Full Time Student	
Award/Reject:	Grant Cancelled	\$1,138	\$1,138	\$2,276
Alternate Award (AA)	\$0	\$569	\$569	\$1,138
Enrollment Status for AA:	Part-Time	Part-Time	Part-Time	
Remedial Exception:				0.0
Award Counters:	0	0.33	0.34	0.67
Award Type:	Cancellation	Processed	Processed	
Cancellation Reason:	Student Not Enrolled	Student Not Enrolled	Student Not Enrolled	
School Adjustment Reason:				
PHEAA Adjustment Reason:				
Classroom Credits:				
Online Credits:				

1. Click the down arrow to the right of the **Update Record** field and click **Distance Education**.

School Portal Distance Education Partner Interface

➔ The **Distance Education Pilot Program** section redisplay with the fields open for edit.

CERTIFY RECORD By Certifying this record you acknowledge that you have reviewed the information for this record and the information is correct.

Distance Education Pilot Program

The Distance Education Pilot Program allows schools to nominate students for awards for distance education. Students must be nominated for participation in each term. Once a student has been nominated, schools must enter the Institutional Reporting Requirements information for the participating student for 5 years.

	Fall	Winter	Spring
School OE Code:	99999997-01	99999997-01	99999997-01
School Name:	Pheaa Quarter University	Pheaa Quarter University	Pheaa Quarter University
Nominate for Distance Education Pilot Award:	<input checked="" type="checkbox"/> Nominated <input type="checkbox"/> Withdraw Nomination	<input type="checkbox"/> Nominate	<input type="checkbox"/> Nominate
CIP Code:	01 - 0101	01 - 0101	01 - 0101
Program Structure:	- Select -	- Select -	- Select -
(Actual) Classroom Credits:	<input type="text"/>	<input type="text"/>	<input type="text"/>
(Actual) Online Credits:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Term GPA:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cumulative GPA:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cumulative Credits Earned:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Primary Credential Completed:	- Select -	- Select -	- Select -
Term Tuition:	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Term Fees:	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

School Notes (Will not be reviewed by PHEAA)

Add comments for this update:

[View Previous Comments](#)

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2. Check **Certify Record** to certify the student for the Distance Education award, or click **Record is Certified**, not shown, to remove certification of the Distance Education award.

The **School OE Code** field displays the eight-digit federal school code assigned by the Department of Education and the two-character suffix assigned by PHEAA.

The **School Name** field displays the name of the school.

School Portal Distance Education Partner Interface

3. In the **Nominated for Distance Education Pilot Award** field, check **Nominate** to nominate the student for the Distance Education Pilot award or **Withdraw Nomination** to withdraw the student's nomination for the Distance Education Pilot award. If the **Withdraw Nomination** box is checked, the nomination that was previously reported for that term will be removed. If all nominations are removed, all previously reported data for the term will be removed and the **Distance Education Pilot** tab will no longer display.

NOTE: The following message displays when there is at least one previously nominated term and a school user is withdrawing the nomination: **WARNING: Withdrawing the nomination will remove student as Participant.**

4. In the **CIP Code** (Classification of Instructional Program) field, enter the two- and four-character CIP code, or click the magnifying glass to the right of the field and select the two- and four-character CIP codes from the **Approved Programs** list. This field is dynamic, meaning that the codes that display in the second part of the field depend on the code that is selected in the first part of the field. *Both parts of this field are required.*
5. In the **Program Structure** field, click the down arrow and select the distance education composition of the student's program of study.
6. In the **(Actual) Classroom Credits** field, enter the number of credits the student has successfully completed in a classroom.
7. In the **(Actual) Online Credits** field, enter the number of credits the student has successfully completed online.
8. In the **Term GPA** field, enter the student's grade point average for the term.
9. In the **Cumulative GPA** field, enter the student's total grade point average.
10. In the **Cumulative Credits Earned** field, enter the total number of credits earned.
11. In the **Primary Credential Completed** field, click the down arrow and select the credential once the student has completed the program.
12. In the **Term Tuition** field, enter the tuition for the term.
13. In the **Term Fees** field, enter the fees for the term.
14. In the **School Notes** field, enter comments regarding the update, if necessary. Click **View Previous Comments** to view comments entered for previous updates. This field is used by the school for informational purposes only and will not be reviewed by PHEAA staff.

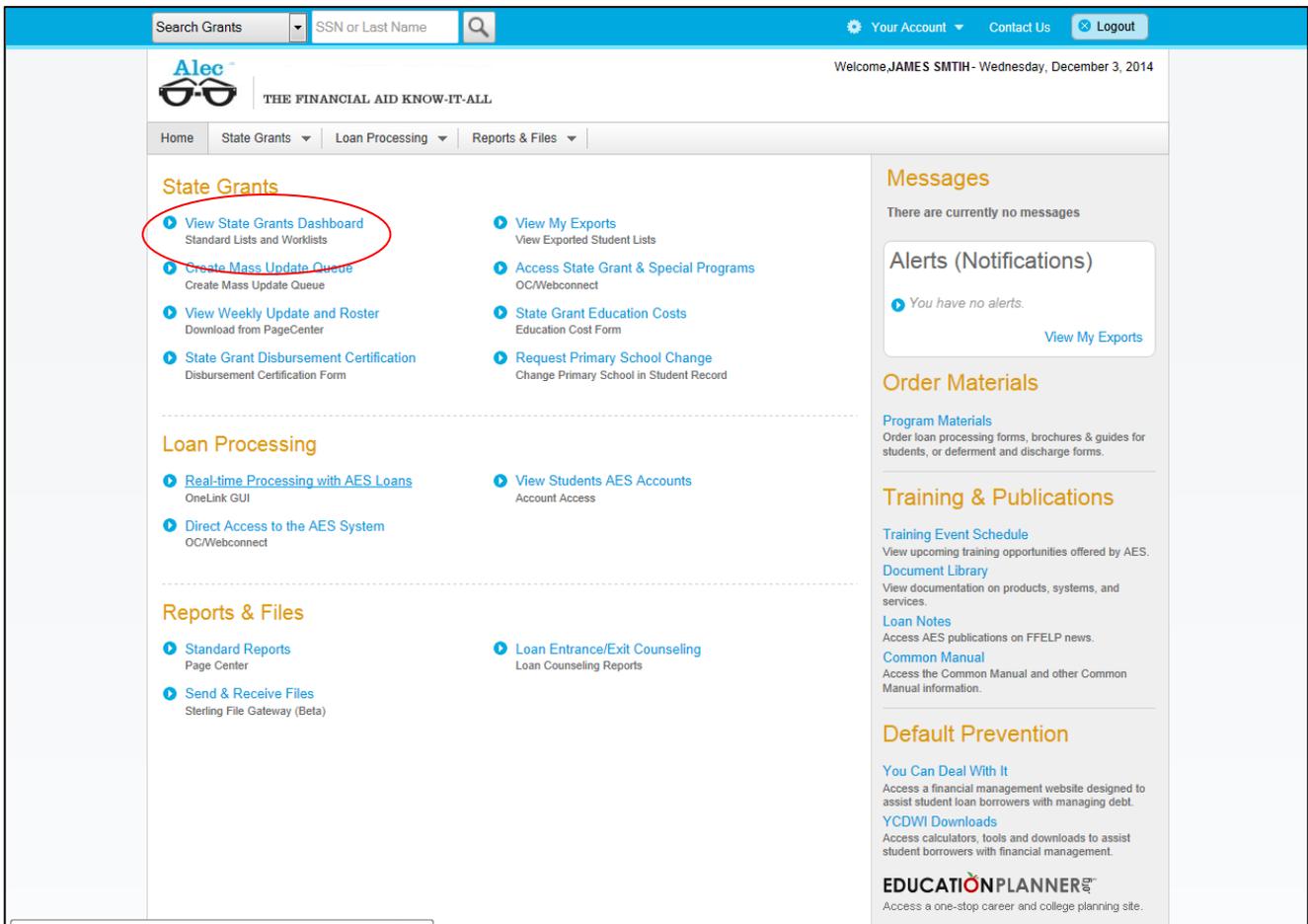


School Portal Distance Education Partner Interface

15. Click **Submit Changes** to submit the updates made to the **Award Adjustments** section, or click **Cancel** to close the **Award Adjustments** section without submitting the updates.

View Distance Education Student Lists on the State Grant Dashboard

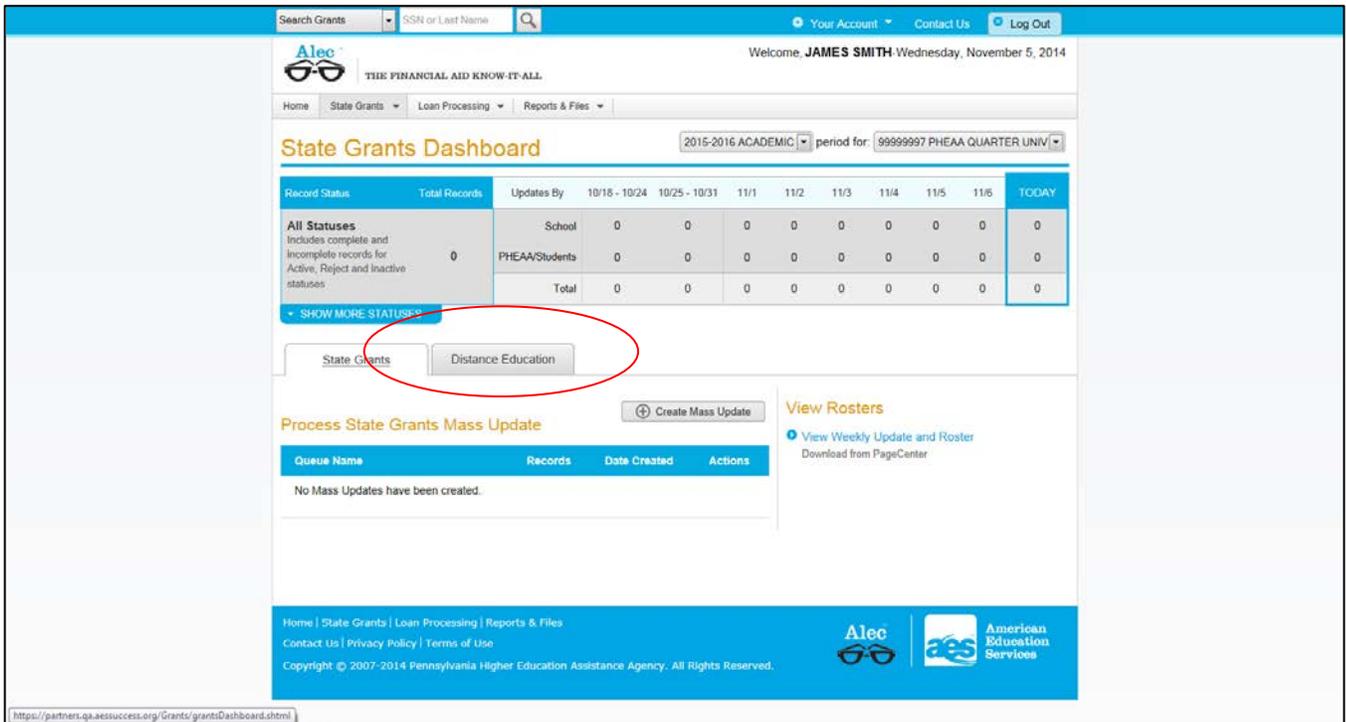
The Distance Education Pilot Program Dashboard displays on the State Grants Dashboard.



1. Click **View State Grants Dashboard**.

School Portal Distance Education Partner Interface

➡ The **State Grants Dashboard** displays.



The screenshot shows the State Grants Dashboard interface. At the top, there is a search bar and user information. The main content area includes a table of record statuses, a 'Process State Grants Mass Update' section, and a 'View Rosters' section. A red circle highlights the 'Distance Education' tab in the 'State Grants' section.

Record Status	Total Records	Updates By	10/16 - 10/24	10/25 - 10/31	11/1	11/2	11/3	11/4	11/5	11/6	TODAY
All Statuses Includes complete and incomplete records for Active, Reject and Inactive statuses.	0	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	0	0	0	0	0
		Total	0	0	0	0	0	0	0	0	0

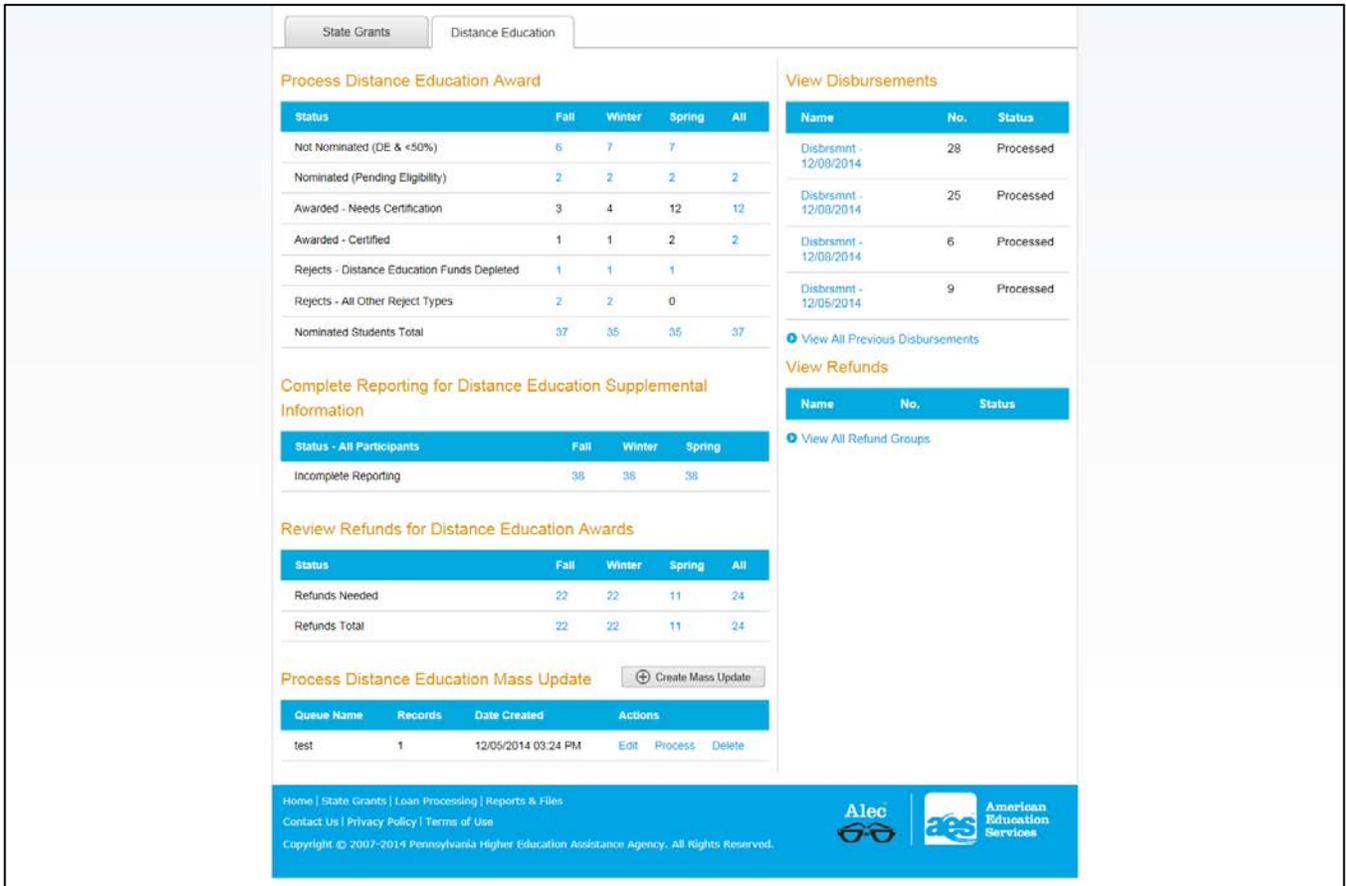
- To view a summary for a different academic year, click the down arrow in the academic year field to select a new academic year to display.
- To view a summary for a different branch, click the down arrow in the school field to select a new branch.
- Click the **Distance Education** tab to view the Distance Education portion of the State Grant Dashboard.

For more information about the State Grant Dashboard, see user guide **WB0123-School Portal State Grant Partner Interface_User Guide_PHEAA**.

School Portal Distance Education Partner Interface

➡ The **Distance Education** tab displays.

The **Distance Education** tab displays student lists, disbursements rosters and refund groups (invoices) for managing the State Grant Distance Education Pilot Program.



The screenshot shows the 'Distance Education' tab with several sections:

- Process Distance Education Award:** A table with columns for Status, Fall, Winter, Spring, and All. Rows include Not Nominated (DE & <50%), Nominated (Pending Eligibility), Awarded - Needs Certification, Awarded - Certified, Rejects - Distance Education Funds Depleted, Rejects - All Other Reject Types, and Nominated Students Total.
- Complete Reporting for Distance Education Supplemental Information:** A table with columns for Status - All Participants, Fall, Winter, and Spring. Row: Incomplete Reporting.
- Review Refunds for Distance Education Awards:** A table with columns for Status, Fall, Winter, Spring, and All. Rows: Refunds Needed and Refunds Total.
- Process Distance Education Mass Update:** A button labeled 'Create Mass Update' and a table with columns for Queue Name, Records, Date Created, and Actions. Row: test.
- View Disbursements:** A table with columns for Name, No., and Status. Rows: Disbsmnt - 12/08/2014 (28, Processed), Disbsmnt - 12/08/2014 (25, Processed), Disbsmnt - 12/08/2014 (6, Processed), Disbsmnt - 12/05/2014 (9, Processed).
- View Refunds:** A table with columns for Name, No., and Status. Row: View All Refund Groups.

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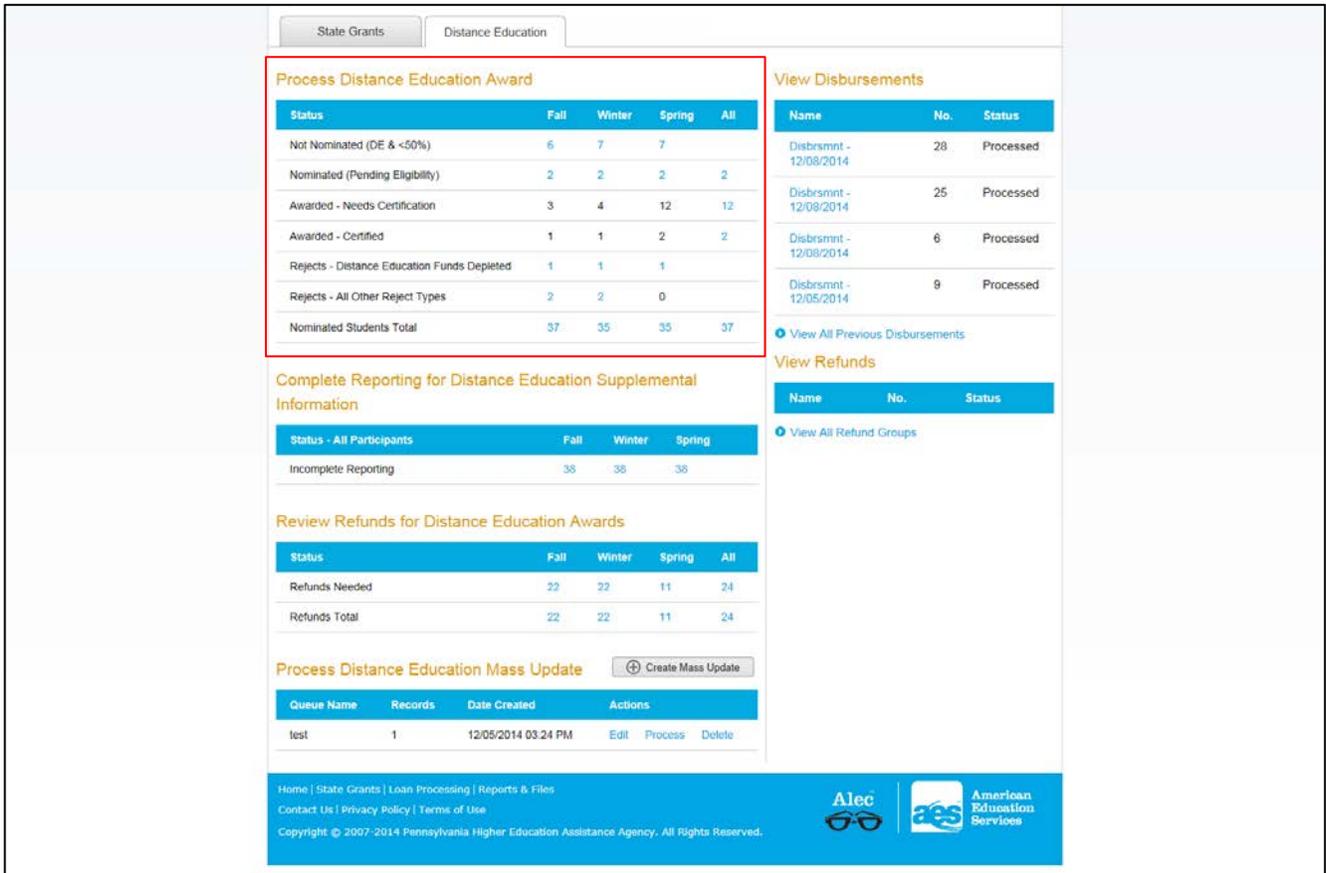
See the following sections for more information:

- [Process Distance Education Award](#)
- [Complete Reporting for Distance Education Supplemental Information](#)
- [Review Refunds for Distance Education Awards](#)

NOTE: [Process Distance Education Mass Update](#), [View Disbursements](#) and [View Refunds](#) are described in later sections of this guide.

Process Distance Education Award

The **Process Distance Education Award** section displays student lists for each status of the SGDEPP processing cycle.



Status	Fail	Winter	Spring	All
Not Nominated (DE & <50%)	6	7	7	
Nominated (Pending Eligibility)	2	2	2	2
Awarded - Needs Certification	3	4	12	12
Awarded - Certified	1	1	2	2
Rejects - Distance Education Funds Depleted	1	1	1	
Rejects - All Other Reject Types	2	2	0	
Nominated Students Total	37	35	35	37

Status - All Participants	Fail	Winter	Spring
Incomplete Reporting	38	38	38

Status	Fail	Winter	Spring	All
Refunds Needed	22	22	11	24
Refunds Total	22	22	11	24

Queue Name	Records	Date Created	Actions
test	1	12/05/2014 03:24 PM	Edit Process Delete

Name	No.	Status
Disbrsmnt - 12/08/2014	28	Processed
Disbrsmnt - 12/08/2014	25	Processed
Disbrsmnt - 12/08/2014	6	Processed
Disbrsmnt - 12/05/2014	9	Processed

Name	No.	Status
------	-----	--------

1. Click a link for the desired term or for all terms to view a Distance Education Student Lists.

NOTE: Some student lists may be viewed by term and academic year while others may be viewed only by term or only by academic year.

See the following sections for more information:

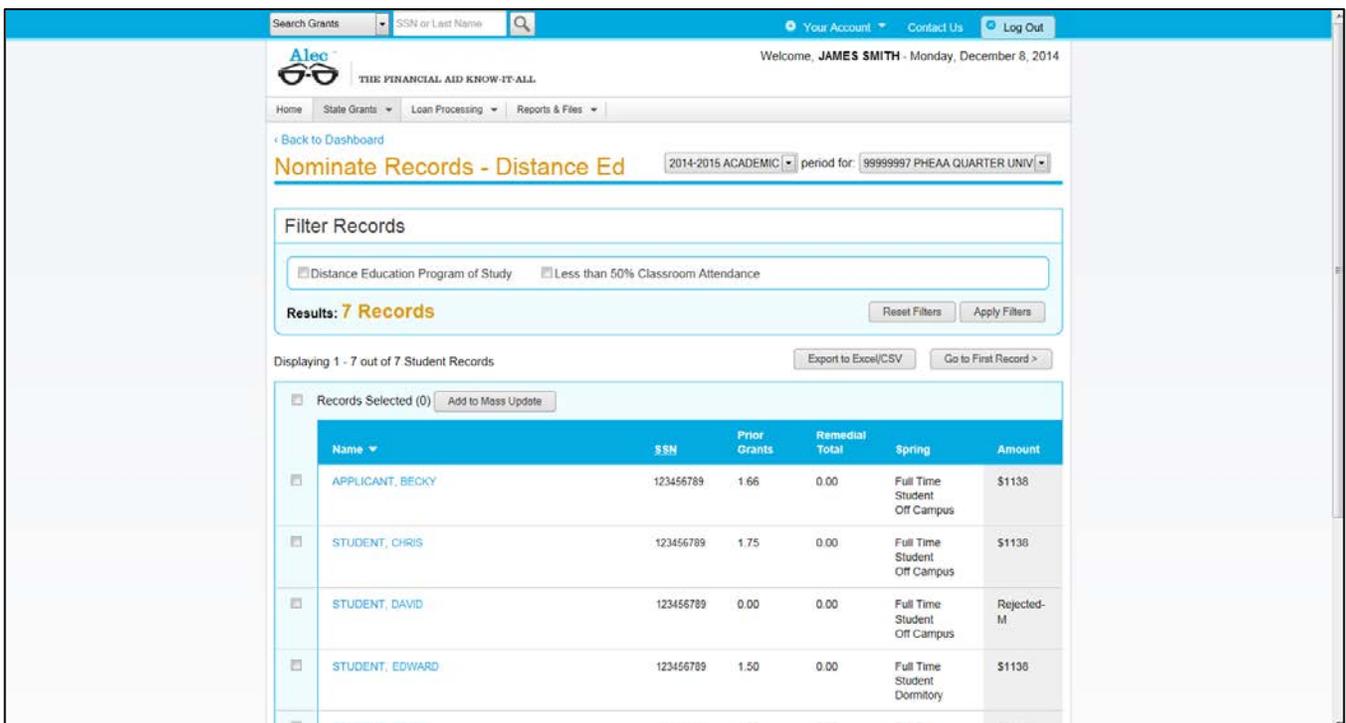
- [Not Nominated \(DE & <50%\)](#)
- [Nominated \(Pending Eligibility\)](#)
- [Awarded - Needs Certification](#)
- [Awarded – Certified](#)
- [Rejects - Distance Education Funds Depleted](#)
- [Rejects – All Other Reject Types](#)
- [Nominated Students Total](#)

School Portal Distance Education Partner Interface

Not Nominated (DE & <50%)

The **Nominate Records – Distance Ed** screen displays a list of students who are not eligible for Pennsylvania State Grants due to classroom enrollment requirements but may qualify for an SGDEPP award. These students have not yet been nominated by their school for the SGDEPP award.

NOTE: This student list may be viewed only by term. The spring term was selected in this example.



The screenshot shows the Aiee web portal interface. At the top, there is a search bar for grants and a user account section for James Smith. The main content area is titled 'Nominate Records - Distance Ed' for the 2014-2015 academic year. Below this, there is a 'Filter Records' section with two checkboxes: 'Distance Education Program of Study' (checked) and 'Less than 50% Classroom Attendance'. The results show 7 records. A table displays the first four records:

Name	SSN	Prior Grants	Remedial Total	Spring	Amount
APPLICANT, BECKY	123456789	1.66	0.00	Full Time Student Off Campus	\$1138
STUDENT, CHRIS	123456789	1.75	0.00	Full Time Student Off Campus	\$1138
STUDENT, DAVID	123456789	0.00	0.00	Full Time Student Off Campus	Rejected-M
STUDENT, EDWARD	123456789	1.50	0.00	Full Time Student Dormitory	\$1138

The following filter options are available in the **Filter Records** section to filter and sort the records in the Student List.

1. Check **Distance Education Program of Study** to filter the student list to display records where the student’s program of study was incorrectly reported as **DE** (Distance Education) on the Student Record.

IMPORTANT! Students whose program of study is reported as **DE** (Distance Education) will not be processed for the Distance Education program. Before nominating students for the Distance Education program, school users must update the student’s Program of Study from **DE** (Distance Education) to the actual Program of Study in which the student is enrolled.



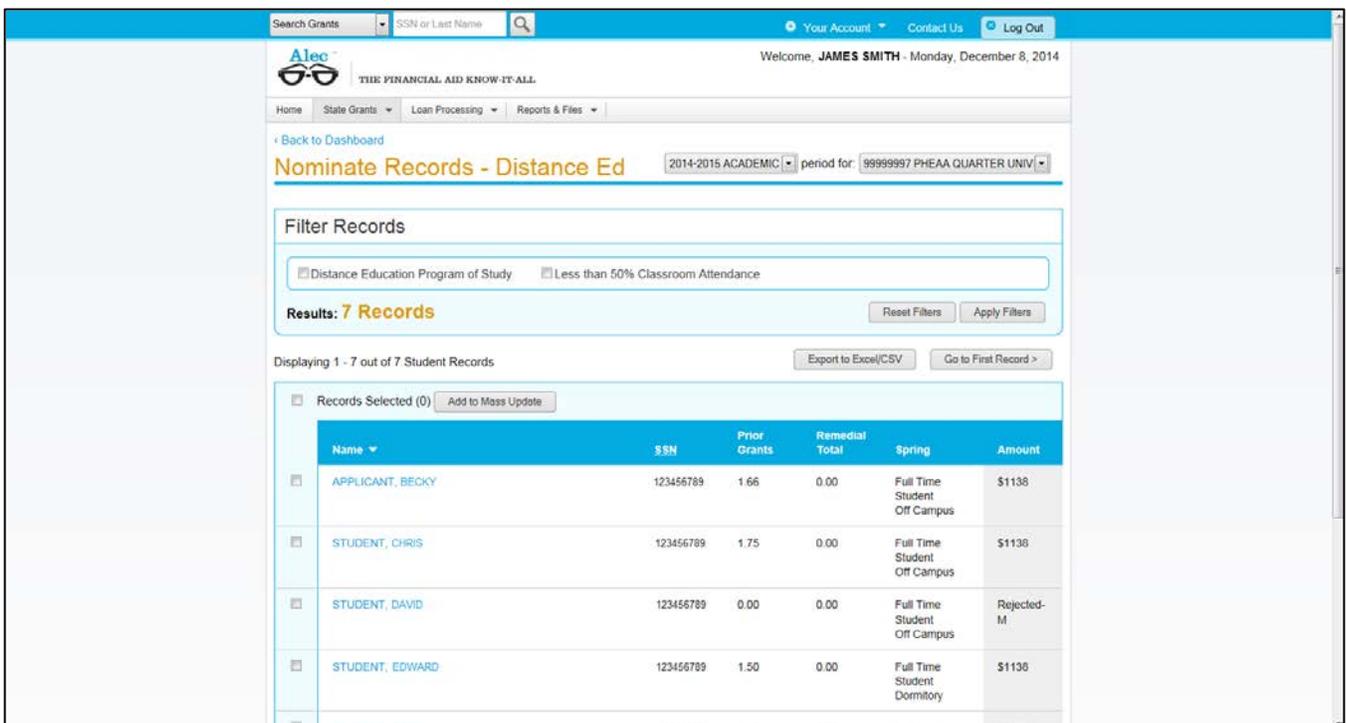
School Portal Distance Education Partner Interface

2. Check **Less than 50% Classroom Attendance** to filter the student list to display records where at least one term of enrollment has been reported as **Less than 50% Classroom**.
3. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.

School Portal Distance Education Partner Interface

➡ The **Nominate Records – Distance Ed** screen is updated to display only the records that match the filter options.

The number of records that meet the filter criteria displays in the **Results** field and the following message displays beneath the **Filter Records** section: **Displaying X – X out of X Student Records**.



The screenshot shows the 'Nominate Records - Distance Ed' interface. At the top, there is a search bar and navigation options. The main content area displays the 'Filter Records' section with two filter options: 'Distance Education Program of Study' and 'Less than 50% Classroom Attendance'. Below the filters, it shows 'Results: 7 Records' and 'Displaying 1 - 7 out of 7 Student Records'. A table of records is displayed with the following columns: Name, SSN, Prior Grants, Remedial Total, Spring, and Amount.

Name	SSN	Prior Grants	Remedial Total	Spring	Amount
APPLICANT, BECKY	123456789	1.66	0.00	Full Time Student Off Campus	\$1138
STUDENT, CHRIS	123456789	1.75	0.00	Full Time Student Off Campus	\$1138
STUDENT, DAVID	123456789	0.00	0.00	Full Time Student Off Campus	Rejected-M
STUDENT, EDWARD	123456789	1.50	0.00	Full Time Student Dormitory	\$1138

The **Name** field displays the student's name.

NOTE: Records are sorted in alphabetical order by last name, then first name.

The **SSN** field displays the nine-digit Social Security number.

The **Prior Grants** field displays a counter of prior State Grant awards. It is the total number of terms for all years for which the student received a State Grant award, not including the selected academic year.

The **Remedial Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

The **Spring** field display term eligibility information, such as an award amount, reject and cancellation reason codes, and enrollment and housing status for the spring term.

School Portal Distance Education Partner Interface

The **Amount** field displays the award amount for the spring term.

NOTE: The **Academic Year Total** field, not shown, displays the total academic year award amount if the school user selected the student list for all terms.

4. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

Additional options display to export and view student records, and to add student records to a mass update queue.

5. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the student list.
6. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.
7. To select one or more records to add to a new mass update queue, check the boxes to the left of the **Name** field. To select all records on the page, check the box in the header.

NOTE: A maximum of 100 records may be added to the mass update queue. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records.

8. Click **Add to Mass Update** to add the selected record(s) to a new mass update queue. See [Create Distance Education Mass Update](#) for step-by-step instructions.

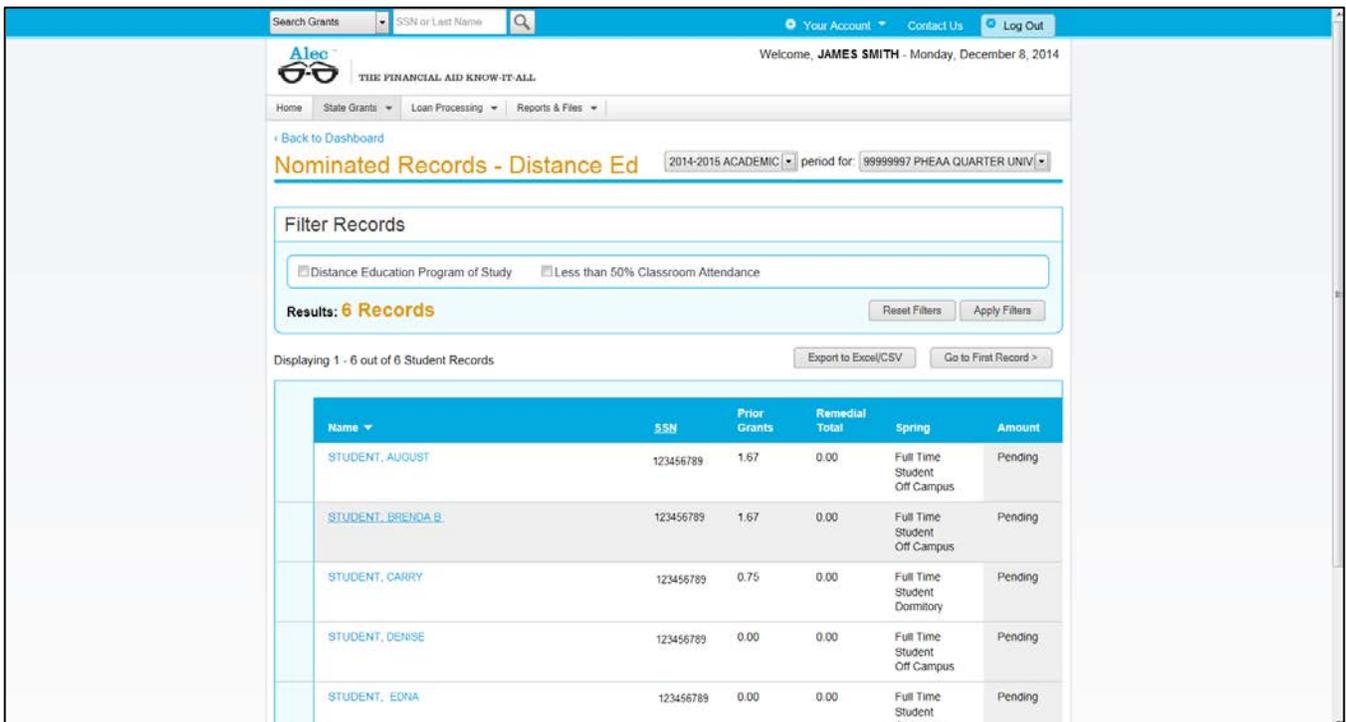
NOTE: Selected student records are automatically added to the new queue. The academic year from the student list is not saved to the new queue.

School Portal Distance Education Partner Interface

Nominated (Pending Eligibility)

The **Nominated Records – Distance Ed** screen displays a list of students who have been nominated for the Distance Education Pilot Program and whose eligibility is pending.

NOTE: This student list may be viewed by term and academic year. The spring term was selected in this example.



The screenshot shows the 'Nominated Records - Distance Ed' interface. It includes a search bar, navigation tabs, and a 'Filter Records' section with checkboxes for 'Distance Education Program of Study' and 'Less than 50% Classroom Attendance'. Below the filters, it displays 'Results: 6 Records' and a table of student records.

Name	SSN	Prior Grants	Remedial Total	Spring	Amount
STUDENT, AUGUST	123456789	1.67	0.00	Full Time Student Off Campus	Pending
STUDENT, BRENDA B.	123456789	1.67	0.00	Full Time Student Off Campus	Pending
STUDENT, CARRY	123456789	0.75	0.00	Full Time Student Dormitory	Pending
STUDENT, DENISE	123456789	0.00	0.00	Full Time Student Off Campus	Pending
STUDENT, EDNA	123456789	0.00	0.00	Full Time Student	Pending

The following filter options are available in the **Filter Records** section to filter and sort the records in the **Student List**.

1. Check **Distance Education Program of Study** to filter the student list to display records where the student's program of study was incorrectly reported as **DE** (Distance Education) on the Student Record.

IMPORTANT! Students whose program of study is reported as **DE** (Distance Education) will not be processed for the Distance Education program. Before nominating students for the Distance Education program, school users must update the student's Program of Study from **DE** (Distance Education) to the actual Program of Study in which the student is enrolled.

2. Check **Less than 50% Classroom Attendance** to filter the student list to display records where at least one term of enrollment has been reported as **Less than 50% Classroom**.



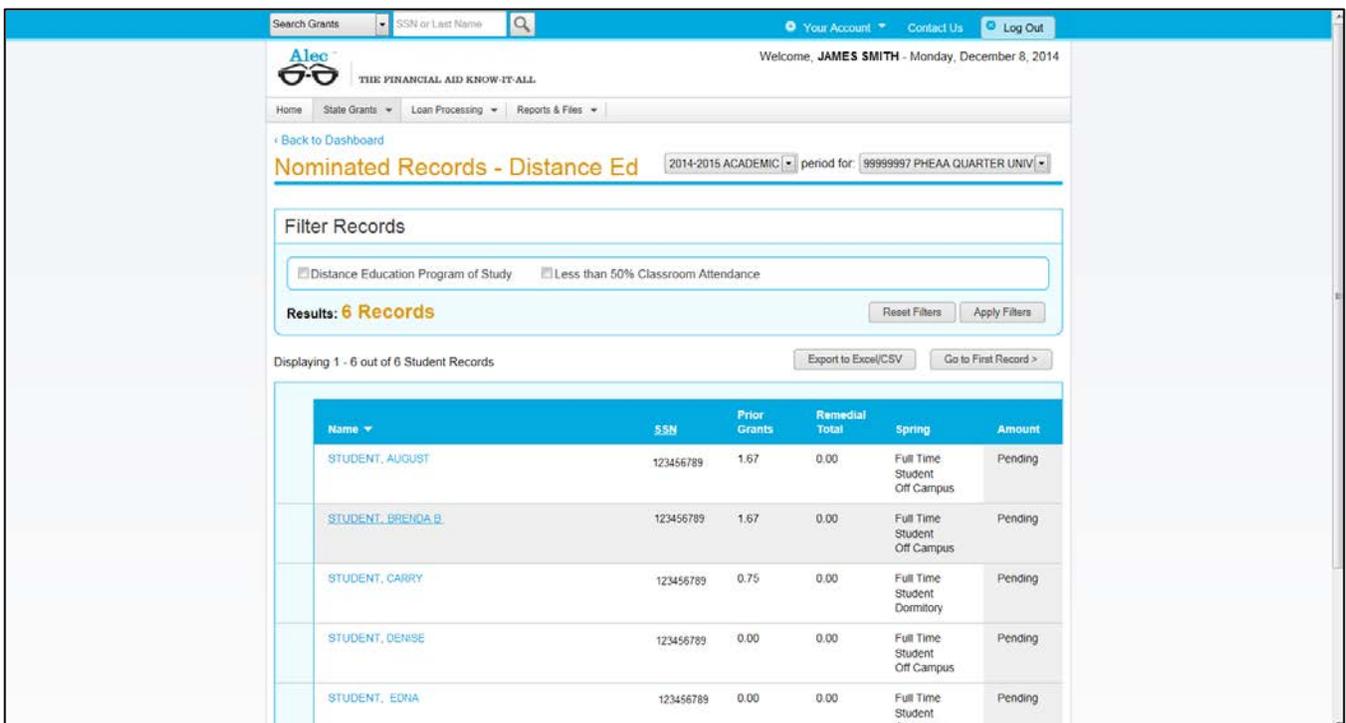
School Portal Distance Education Partner Interface

3. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.

School Portal Distance Education Partner Interface

➔ The **Nominated Records – Distance Ed** screen is updated to display only the records that match the filter options.

The number of records that meet the filter criteria displays in the **Results** field and the following message displays beneath the **Filter Records** section: **Displaying X – X out of X Student Records**.



The screenshot shows the 'Nominated Records - Distance Ed' interface. It includes a search bar, navigation tabs, and a 'Filter Records' section with checkboxes for 'Distance Education Program of Study' and 'Less than 50% Classroom Attendance'. Below the filters, it displays 'Results: 6 Records' and 'Displaying 1 - 6 out of 6 Student Records'. A table lists the following records:

Name	SSN	Prior Grants	Remedial Total	Spring	Amount
STUDENT, AUGUST	123456789	1.67	0.00	Full Time Student Off Campus	Pending
STUDENT, BRENDA B.	123456789	1.67	0.00	Full Time Student Off Campus	Pending
STUDENT, CARRY	123456789	0.75	0.00	Full Time Student Dormitory	Pending
STUDENT, DENISE	123456789	0.00	0.00	Full Time Student Off Campus	Pending
STUDENT, EDNA	123456789	0.00	0.00	Full Time Student	Pending

The **Name** field displays the student’s name.

NOTE: Records are sorted in alphabetical order by last name, then first name.

The **SSN** field displays the nine-digit Social Security number.

The **Prior Grants** field displays a counter of prior State Grant awards. It is the total number of terms for all years for which the student received a State Grant award, not including the selected academic year.

The **Remedial Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

The **Spring** field display term eligibility information, such as an award amount, reject and cancellation reason codes, and enrollment and housing status for the spring term.

School Portal Distance Education Partner Interface

NOTE: The spring term was selected in this example. If the school user selected the student list for all terms, each term displays. Otherwise, only the selected term displays.

The **Amount** field displays the award amount for the spring term.

NOTE: The **Academic Year Total** field, not shown, displays the total academic year award amount if the school user selected the student list for all terms.

4. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

Additional options display to export and view student records.

5. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the student list.
6. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.

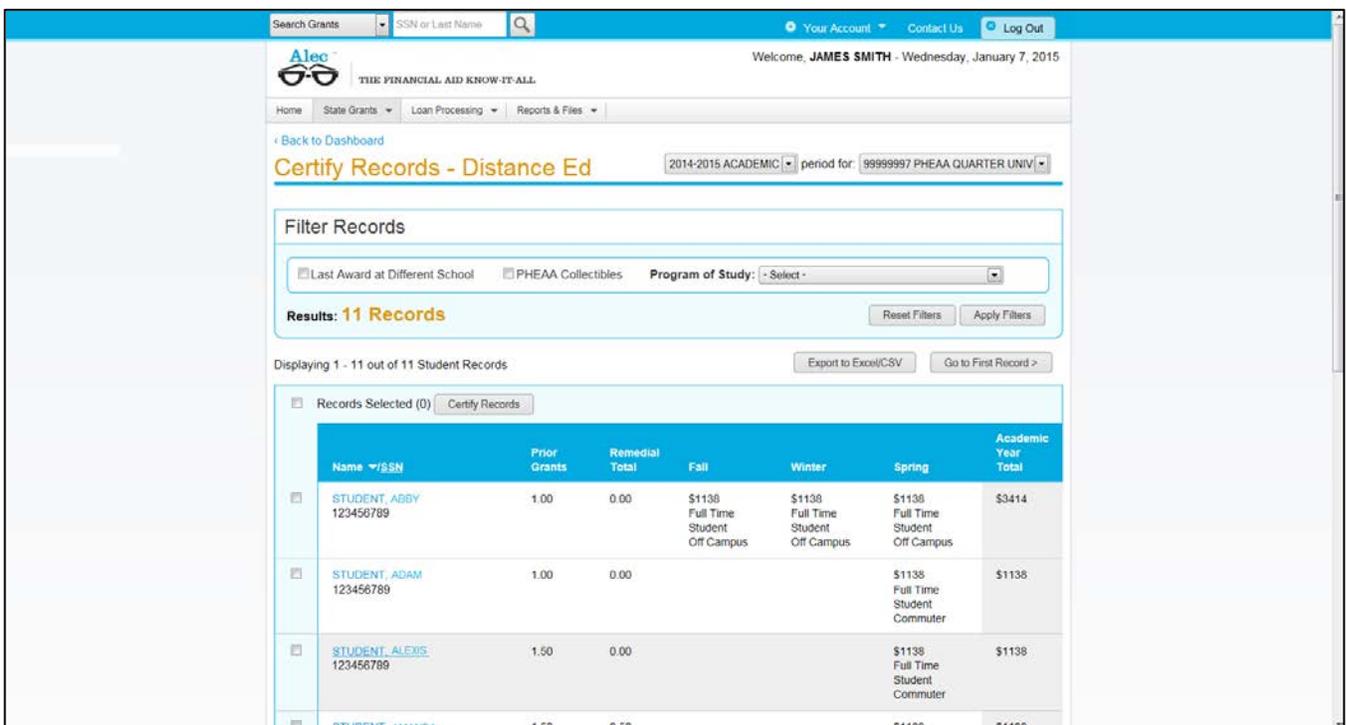
NOTE: Students on this list cannot be added to a mass update queue to be updated en masse. To change a student record, school users must update records individually. See [Update Distance Education Information on the Student Record](#) for step-by-step instructions.

School Portal Distance Education Partner Interface

Awarded - Needs Certification

The **Certify Records – Distance Ed** page displays a list of students who have been awarded a Distance Education award and who must be certified by the school.

NOTE: The list is not populated until PHEAA runs the certification batch process. Generally, this occurs immediately prior to the school’s term start date. Once the information is displayed, it may be viewed only for the entire academic year. This ensures that certification is complete for all terms.



The screenshot shows the 'Certify Records - Distance Ed' page. At the top, there is a search bar and navigation links. The main content area features a 'Filter Records' section with checkboxes for 'Last Award at Different School' and 'PHEAA Collectibles', and a dropdown for 'Program of Study'. Below the filters, it shows 'Results: 11 Records'. A table displays the following data:

Name	SSN	Prior Grants	Remedial Total	Fall	Winter	Spring	Academic Year Total
STUDENT, ABBY	123456789	1.00	0.00	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$3414
STUDENT, ADAM	123456789	1.00	0.00			\$1138 Full Time Student Commuter	\$1138
STUDENT, ALEXIS	123456789	1.50	0.00			\$1138 Full Time Student Commuter	\$1138

The following filter options are available in the **Filter Records** section to filter and sort the records in the **Student List**.

1. Check **Last Award at Different School** (also known as “LADS”) to filter the student list to display students where the last State Grant or SGDEPP award was at a different school at the time the **Awarded – Needs Certification** list was generated. Schools can use this filter option to export a list of students for whom transcripts are needed or to select individual records to view the previous school on the Eligibility Record. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the student list.

NOTE: Students who received their fall award in the spring will not display on this list since the fall term was awarded at the same school as spring term.

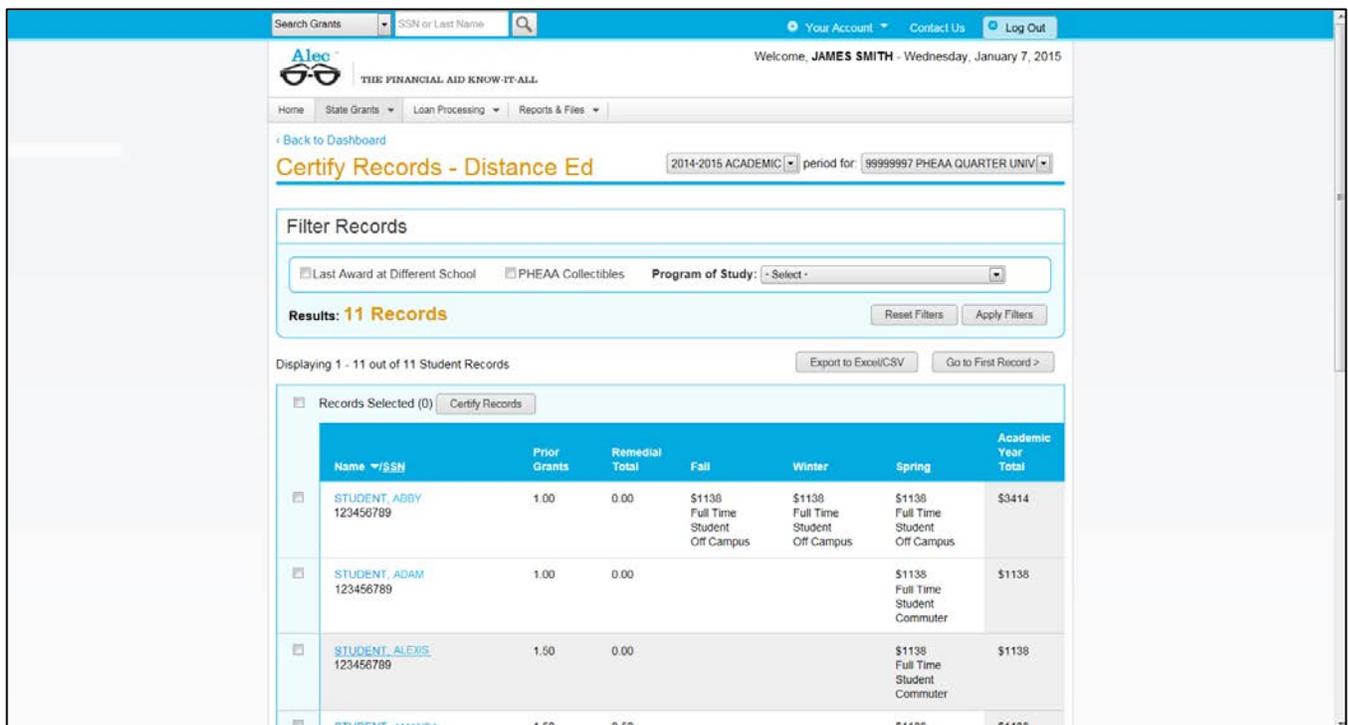
School Portal Distance Education Partner Interface

2. Check **PHEAA Collectibles** to filter the student list to display records where PHEAA has initiated the collection of an over-award directly from the student.
3. Click the down arrow in the **Program of Study** field and select a program of study from the drop-down list. This field is dynamic and displays choices based on the school and/or branch campus that was selected in the **Branch Campus** field.
4. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.

School Portal Distance Education Partner Interface

➔ The **Certify Records – Distance Ed** page is updated to display only the records that match the filter options.

The number of records that meet the filter criteria displays in the **Results** field and the following message displays beneath the **Filter Records** section: **Displaying X – X out of X Student Records**.



The screenshot shows the 'Certify Records - Distance Ed' page. At the top, there is a search bar and navigation links. Below the search bar, there are filter options: 'Last Award at Different School', 'PHEAA Collectibles', and 'Program of Study'. The results section shows 'Results: 11 Records' and 'Displaying 1 - 11 out of 11 Student Records'. Below this is a table with the following columns: Name/SSN, Prior Grants, Remedial Total, Fall, Winter, Spring, and Academic Year Total.

Name/SSN	Prior Grants	Remedial Total	Fall	Winter	Spring	Academic Year Total
STUDENT_ABBY 123456789	1.00	0.00	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$3414
STUDENT_ADAM 123456789	1.00	0.00			\$1138 Full Time Student Commuter	\$1138
STUDENT_ALEXIS 123456789	1.50	0.00			\$1138 Full Time Student Commuter	\$1138
STUDENT_ALEXIS 123456789	1.50	2.50			\$1138	\$1138

The **Name/SSN** field displays the student’s name and nine-digit Social Security number

NOTE: By default, the records are sorted in alphabetical order by last name, then first name. School users can click **SSN** in the header to sort records by SSN.

The **Prior Grants** field displays a counter of prior State Grant awards. It is the total number of terms for all years for which the student received a State Grant award, not including the selected academic year.

The **Remedial Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

The **Fall**, **Winter** and **Spring** fields display term eligibility information, such as an award amount, reject and cancellation reason codes, and enrollment and housing status for each term.

School Portal Distance Education Partner Interface

The **Academic Year Total** field displays the total academic year award amount for all terms.

5. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

Additional options display to export and view student records and to certify student records.

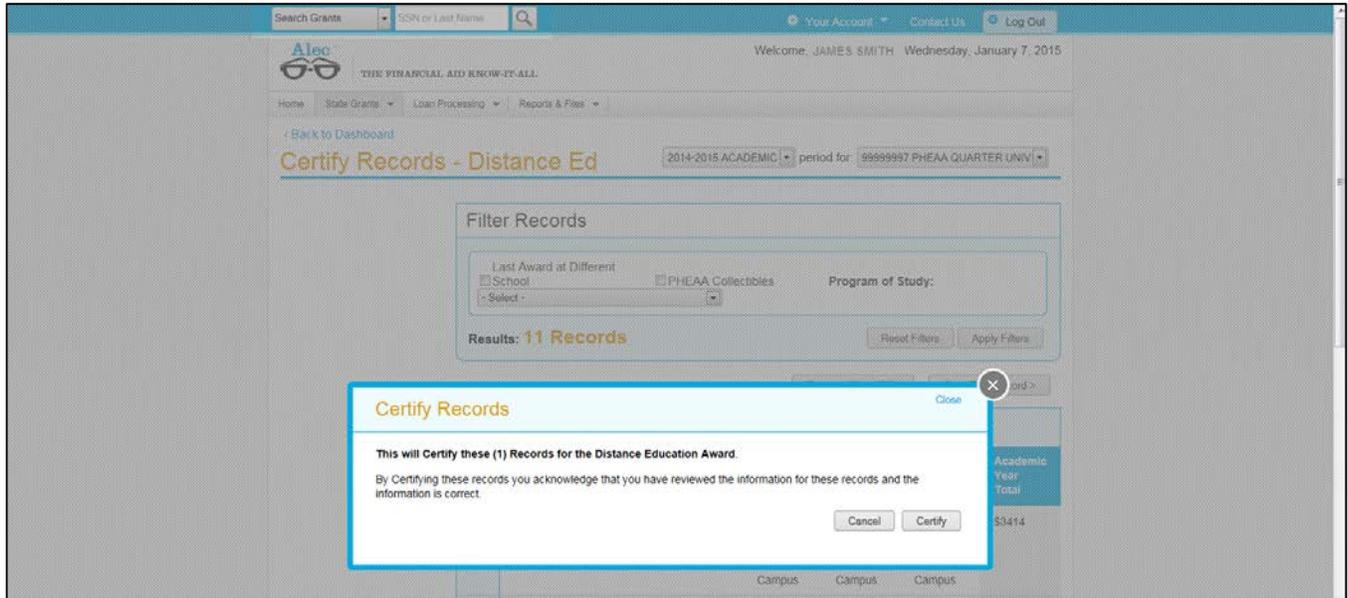
6. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the student list.
7. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.
8. To select one or more records to certify, check the boxes to the left of the **Name/SSN** field. To select all records on the page, check the box in the header.

NOTE: There is no maximum to the number of records that may be certified. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records.

9. Click **Certify Records** to certify selected records.

School Portal Distance Education Partner Interface

➔ The **Certify Records** dialog box displays.



10. Click **Certify** to certify the records, or click **Cancel** to close the **Certify Records** dialog box and return to the **Awarded - Needs Certification** student list.

School Portal Distance Education Partner Interface

➡ The **Certify Records – Distance Ed** screen redisplay with the following message: **Records were successfully Certified.**

NOTE: Once a record is certified, the student displays on the **Awarded – Certified** student list.

Search Grants [SSN or Last Name] [Search Icon] [Your Account] [Contact Us] [Log Out]

Alec THE FINANCIAL AID KNOW-IT-ALL Welcome, JAMES SMITH - Friday, December 19, 2014

Home | State Grants | Loan Processing | Reports & Files

[Back to Dashboard](#)

Certify Records - Distance Ed

2014-2015 ACADEMIC period for: 99999997 PHEAA QUARTER UNIV

Records were successfully Certified

Filter Records

Last Award at Different School PHEAA Collectibles Program of Study: - Select -

Results: 11 Records [Reset Filters] [Apply Filters]

Displaying 1 - 11 out of 11 Student Records [Export to Excel/CSV] [Go to First Record >]

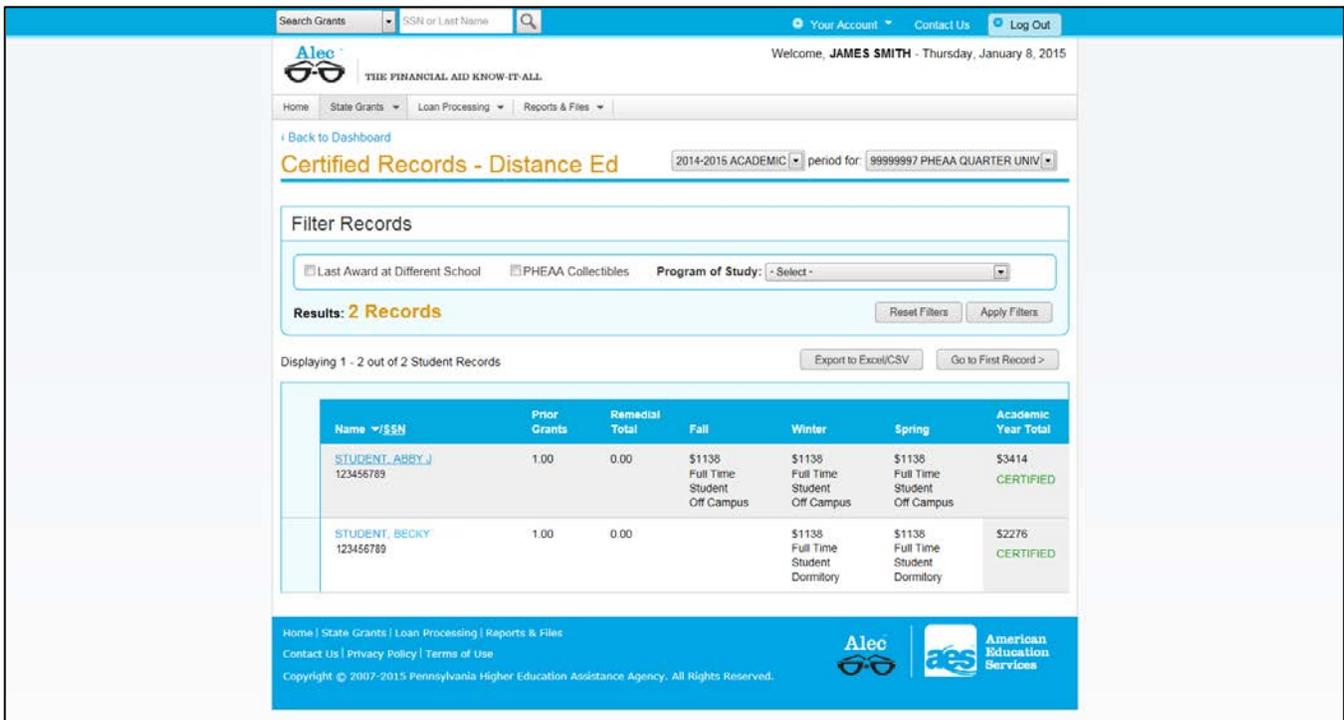
Records Selected (0) [Certify Records]

Name ▼/SSN	Prior Grants	Remedial Total	Fall	Winter	Spring	Academic Year Total
<input type="checkbox"/> STUDENT, APRIL 123456789	1.00	0.00	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$3414

Awarded – Certified

The **Certified Records – Distance Ed** page displays a list of students who have been awarded and certified for a Distance Education award.

NOTE: This student list may be viewed only for the entire academic year.



The screenshot shows the 'Certified Records - Distance Ed' page. At the top, there is a search bar for 'Search Grants' with a dropdown for 'SSN or Last Name'. The user is logged in as 'JAMES SMITH' on 'Thursday, January 8, 2015'. The page title is 'Certified Records - Distance Ed' for the '2014-2015 ACADEMIC' period at '99999997 PHEAA QUARTER UNIV'. Below the title is a 'Filter Records' section with checkboxes for 'Last Award at Different School' and 'PHEAA Collectibles', and a 'Program of Study' dropdown menu. The results show '2 Records'. Below the filters is a table with columns: Name, SSN, Prior Grants, Remedial Total, Fall, Winter, Spring, and Academic Year Total. Two student records are displayed, both marked as 'CERTIFIED'.

Name	SSN	Prior Grants	Remedial Total	Fall	Winter	Spring	Academic Year Total
STUDENT, ABBY	123456789	1.00	0.00	\$1135 Full Time Student Off Campus	\$1135 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$3414 CERTIFIED
STUDENT, BECKY	123456789	1.00	0.00		\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$2276 CERTIFIED

The following filter options are available in the **Filter Records** section to filter and sort the records in the **Student List**.

1. Check **Last Award at Different School** (also known as “LADS”) to filter the student list to display students where the last State Grant or SGDEPP award was at a different school at the time the **Awarded – Needs Certification** list was generated. Schools can use this filter option to export a list of students for whom transcripts are needed or to select individual records to view the previous school on the Eligibility Record. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the student list.

NOTE: Students who received their fall award in the spring will not display on this list since the fall term was awarded at the same school as spring term.

2. Check **PHEAA Collectibles** to filter the student list to display records where PHEAA has initiated the collection of an over-award directly from the student.

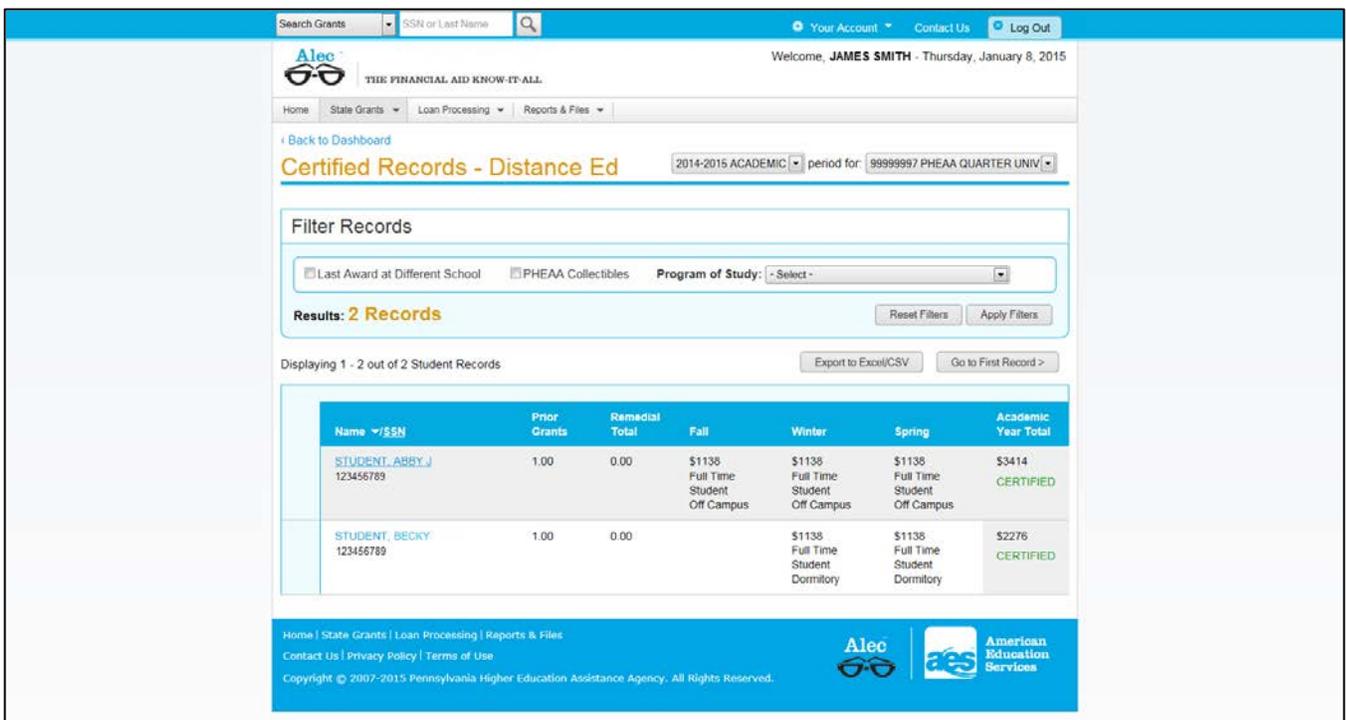
School Portal Distance Education Partner Interface

3. Click the down arrow in the **Program of Study** field and select a program of study from the drop-down list. This field is dynamic and displays choices based on the school and/or branch campus that was selected in the **Branch Campus** field.
4. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.

School Portal Distance Education Partner Interface

➡ The **Certified Records – Distance Ed** page is updated to display only the records that match the filter options.

The number of records that meet the filter criteria displays in the **Results** field and the following message displays beneath the **Filter Records** section: **Displaying X – X out of X Student Records**.



The screenshot shows the 'Certified Records - Distance Ed' page. At the top, there is a search bar for 'SSN or Last Name' and a 'Log Out' button. Below the search bar, there is a navigation menu with options like 'Home', 'State Grants', 'Loan Processing', and 'Reports & Files'. The main content area displays 'Certified Records - Distance Ed' for the '2014-2015 ACADEMIC' period. A 'Filter Records' section includes checkboxes for 'Last Award at Different School' and 'PHEAA Collectibles', and a 'Program of Study' dropdown menu. Below the filter section, it shows 'Results: 2 Records' and buttons for 'Reset Filters' and 'Apply Filters'. A table displays the following data:

Name /SSN	Prior Grants	Remedial Total	Fall	Winter	Spring	Academic Year Total
STUDENT, ABBY J 123456789	1.00	0.00	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$3414 CERTIFIED
STUDENT, BECKY 123456789	1.00	0.00		\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$2276 CERTIFIED

The **Name/SSN** field displays the student’s name and nine-digit Social Security number.

NOTE: By default, the records are sorted in alphabetical order by last name, then first name. School users can click **SSN** in the header to sort records by SSN.

The **Prior Grants** field displays a counter of prior State Grant awards. It is the total number of terms for all years for which the student received a State Grant award, not including the selected academic year.

The **Remedial Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

The **Fall**, **Winter** and **Spring** fields display term eligibility information, such as an award amount, reject and cancellation reason codes, and enrollment and housing status for each term.

School Portal Distance Education Partner Interface

The **Academic Year Total** field displays the total academic year award amount for all terms.

5. To view an individual student record, scroll over the student list to highlight a student record. Click the student record or click the link in the **Name** field. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

Additional options display to export and view student records.

6. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the student list.
7. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.

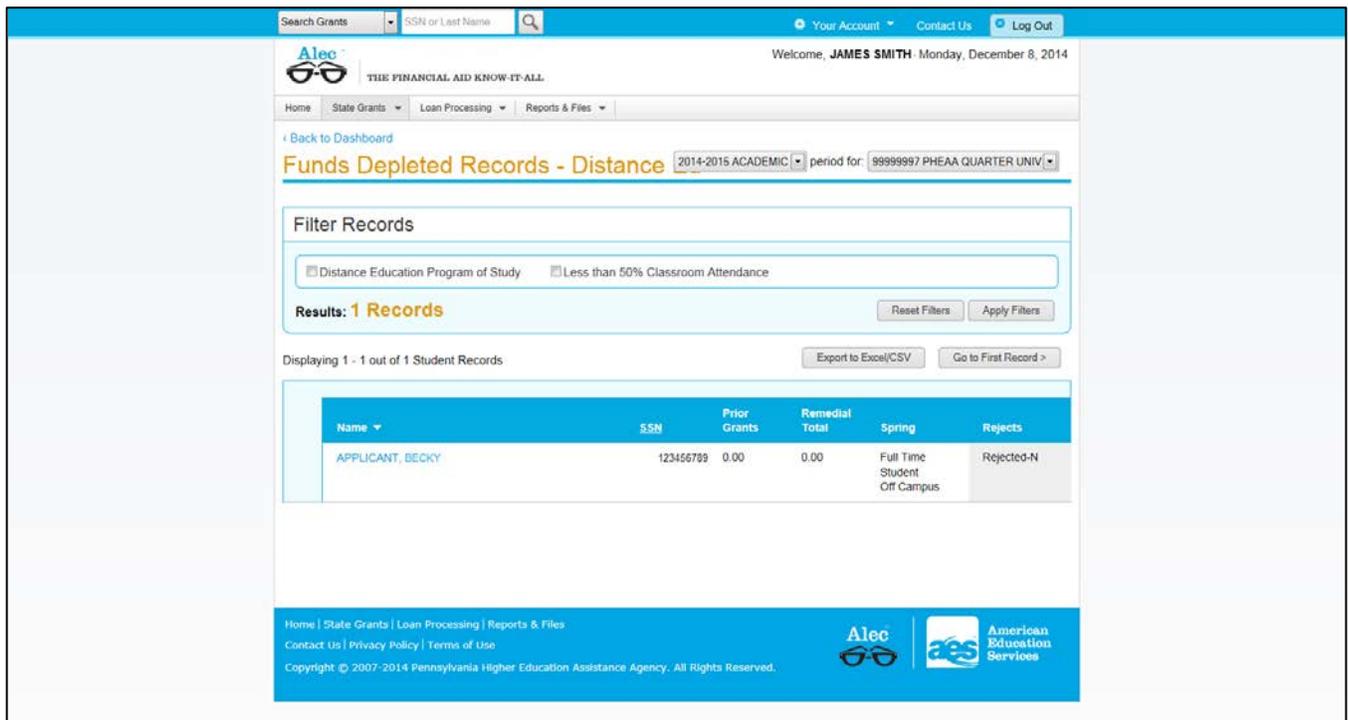
NOTE: Once certified, student records cannot be added to a mass update queue to be remove certification en masse. To remove certification from a student record, school users must update records individually. See the [Update Distance Education Information on the Student Record](#) section for step-by-step instructions.

School Portal Distance Education Partner Interface

Rejects - Distance Education Funds Depleted

The **Funds Depleted Records – Distance Ed** screen displays a list of students who have been denied a Distance Education award because program funds are depleted.

NOTE: This student list may be viewed only by term. The spring term was selected in this example.



The screenshot shows the 'Funds Depleted Records - Distance' screen. The page title is 'Funds Depleted Records - Distance' with a dropdown for '2014-2015 ACADEMIC' and a 'period for' dropdown set to '99999997 PHEAA QUARTER UNIV'. Below the title is a 'Filter Records' section with two checkboxes: 'Distance Education Program of Study' (checked) and 'Less than 50% Classroom Attendance'. The results show '1 Records'. Below the filters, there is a table with the following data:

Name	SSN	Prior Grants	Remedial Total	Spring	Rejects
APPLICANT, BECKY	123456789	0.00	0.00	Full Time Student Off Campus	Rejected-N

The following filter options are available in the **Filter Records** section to filter and sort the records in the **Student List**.

1. Check **Distance Education Program of Study** to filter the student list to display records where the student's program of study was incorrectly reported as **DE** (Distance Education) on the Student Record.

IMPORTANT! Students whose program of study is reported as **DE** (Distance Education) will not be processed for the Distance Education program. Before nominating students for the Distance Education program, school users must update the student's Program of Study from **DE** (Distance Education) to the actual Program of Study in which the student is enrolled.

2. Check **Less than 50% Classroom Attendance** to filter the student list to display records where at least one term of enrollment has been reported as **Less than 50% Classroom**.



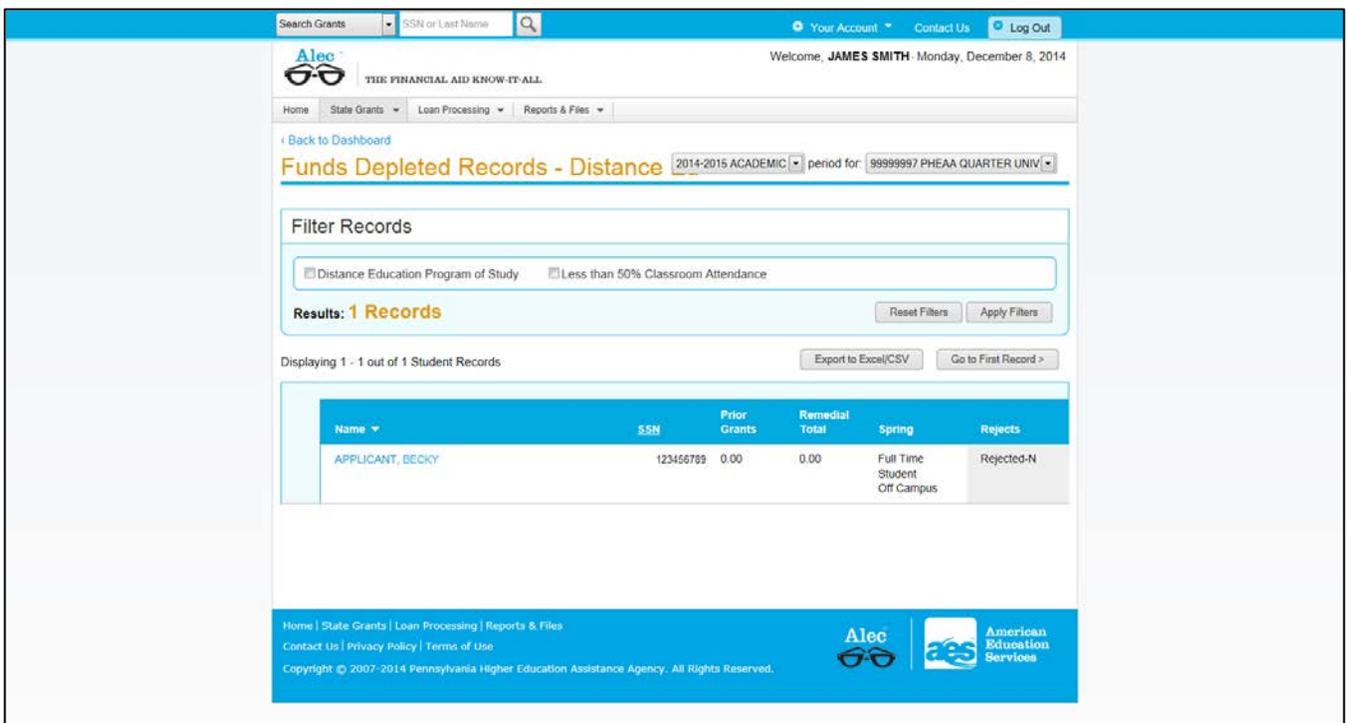
School Portal Distance Education Partner Interface

3. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.

School Portal Distance Education Partner Interface

➔ The **Funds Depleted Records – Distance Ed** student list is updated to display only the records that match the filter options.

The number of records that meet the filter criteria displays in the **Results** field and the following message displays beneath the **Filter Records** section: **Displaying X – X out of X Student Records**.



The screenshot shows the 'Funds Depleted Records - Distance' page. The page title is 'Funds Depleted Records - Distance' with a dropdown for '2014-2015 ACADEMIC' and a 'period for' dropdown set to '99999997 PHEAA QUARTER UNIV'. Below the title is a 'Filter Records' section with two checkboxes: 'Distance Education Program of Study' (checked) and 'Less than 50% Classroom Attendance'. The results section shows 'Results: 1 Records' and 'Displaying 1 - 1 out of 1 Student Records'. A table displays the following data:

Name	SSN	Prior Grants	Remedial Total	Spring	Rejects
APPLICANT, BECKY	123456789	0.00	0.00	Full Time Student Off Campus	Rejected-N

The **Name** field displays the student's name.

NOTE: Records are sorted in alphabetical order by last name, then first name.

The **SSN** field displays the nine-digit Social Security number.

The **Prior Grants** field displays a counter of prior State Grant awards. It is the total number of terms for all years for which the student received a State Grant award, not including the selected academic year.

The **Remedial Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

The **Spring** field displays term eligibility information, such as an award amount, reject and cancellation reason codes, and enrollment and housing status for the spring term.

School Portal Distance Education Partner Interface

The **Rejects** field displays **Rejected N** indicating that SGDEPP funds have been depleted.

4. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

Additional options display to export and view student records.

5. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the student list.
6. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.

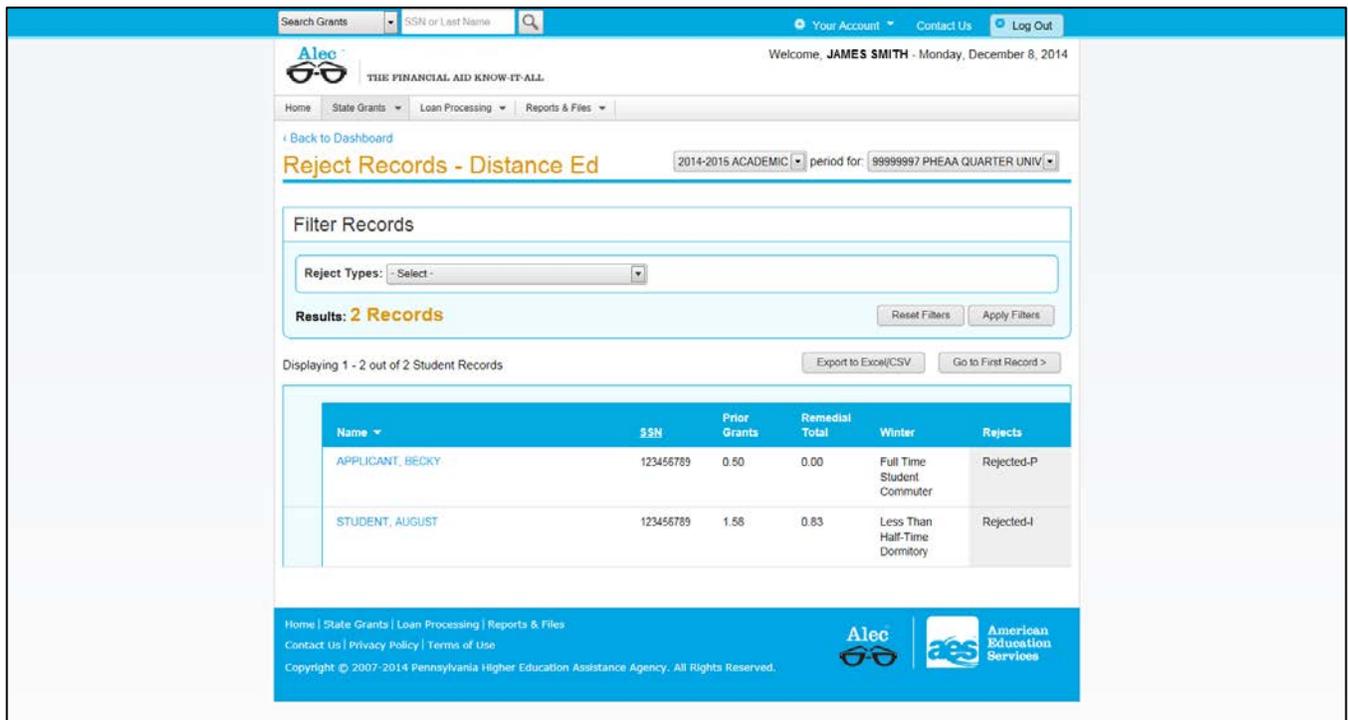
NOTE: Students on this list cannot be added to a mass update queue to be updated en masse. To change a student record, school users must update records individually. See [Update Distance Education Information on the Student Record](#) for step-by-step instructions.

School Portal Distance Education Partner Interface

Rejects – All Other Reject Types

The **Reject Records – Distance Ed** screen displays a list of students that have been denied a Distance Education award for any reason other than Funds Depleted.

NOTE: This student list may be viewed only by term. The winter term was selected in this example.



The screenshot shows the 'Reject Records - Distance Ed' interface. At the top, there is a search bar for 'SSN or Last Name' and a welcome message for 'JAMES SMITH'. Below the search bar, there are navigation links for 'Home', 'State Grants', 'Loan Processing', and 'Reports & Files'. The main heading is 'Reject Records - Distance Ed' with a dropdown for '2014-2015 ACADEMIC' and a 'period for' field set to '99999997 PHEAA QUARTER UNIV'. A 'Filter Records' section contains a 'Reject Types' dropdown menu. Below this, it shows 'Results: 2 Records' and buttons for 'Reset Filters' and 'Apply Filters'. A table displays the following data:

Name	SSN	Prior Grants	Remedial Total	Winter	Rejects
APPLICANT, BECKY	123456789	0.50	0.00	Full Time Student Commuter	Rejected-P
STUDENT, AUGUST	123456789	1.58	0.83	Less Than Half-Time Dormitory	Rejected-I

At the bottom of the page, there are navigation links, the Alec logo, and the American Education Services logo. Copyright information for 2007-2014 Pennsylvania Higher Education Assistance Agency is also present.

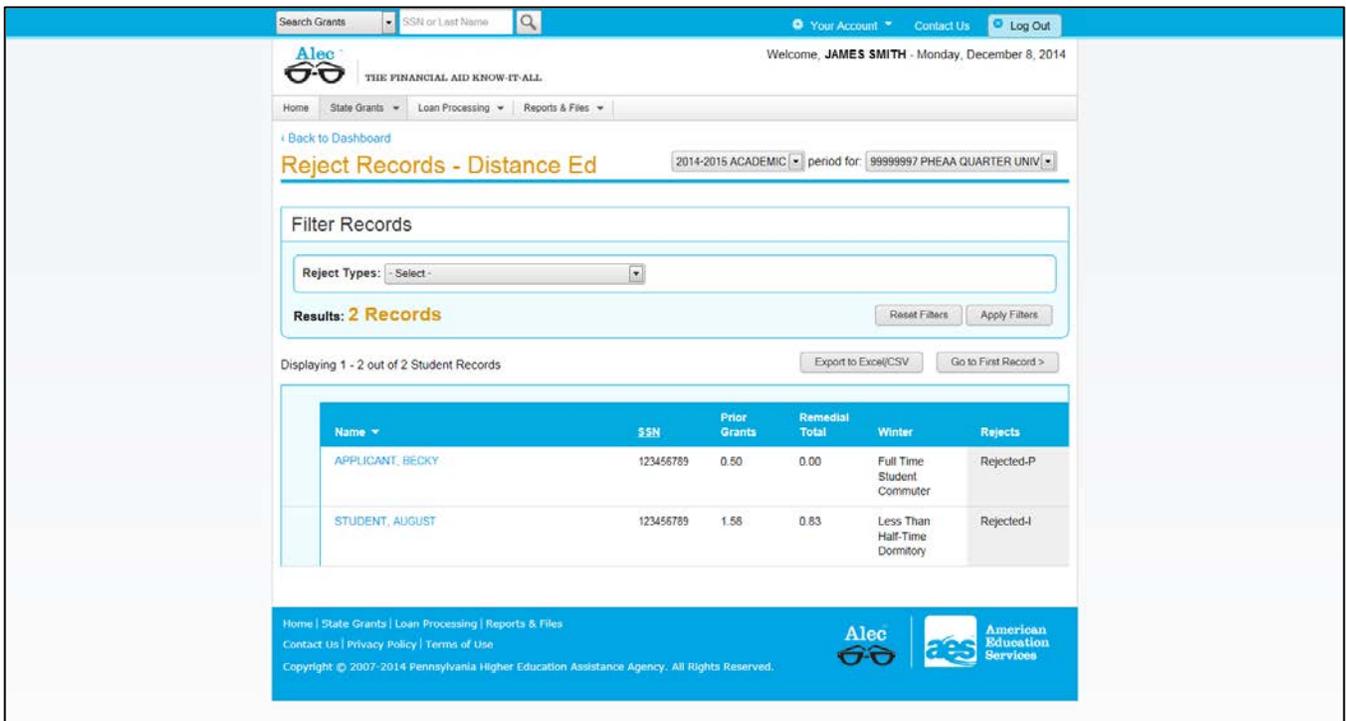
The following filter options are available in the **Filter Records** section to filter and sort the records in the **Student List**.

1. Click the down arrow in the **Rejects Types** field and select a reason for the reject.
2. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.

School Portal Distance Education Partner Interface

➔ The **Reject Records – Distance Ed** screen is updated to display only the records that match the filter options.

The number of records that meet the filter criteria displays in the **Results** field and the following message displays beneath the **Filter Records** section: **Displaying X – X out of X Student Records**.



The screenshot shows the 'Reject Records - Distance Ed' interface. At the top, there is a search bar for 'SSN or Last Name' and a 'Log Out' button. The user is identified as 'JAMES SMITH' on 'Monday, December 8, 2014'. The page title is 'Reject Records - Distance Ed' for the '2014-2015 ACADEMIC' period at '99999997 PHEAA QUARTER UNIV'. Below the title is a 'Filter Records' section with a 'Reject Types' dropdown menu. The results show '2 Records'. Below this, a message states 'Displaying 1 - 2 out of 2 Student Records'. The main data is presented in a table:

Name	SSN	Prior Grants	Remedial Total	Winter	Rejects
APPLICANT, BECKY	123456789	0.50	0.00	Full Time Student Commuter	Rejected-P
STUDENT, AUGUST	123456789	1.58	0.83	Less Than Half-Time Dormitory	Rejected-I

At the bottom of the page, there are navigation links, the Alec logo, and the American Education Services logo. Copyright information for 2007-2014 Pennsylvania Higher Education Assistance Agency is also present.

The **Name** field displays the student's name.

NOTE: Records are sorted in alphabetical order by last name, then first name.

The **SSN** field displays the nine-digit Social Security number.

The **Prior Grants** field displays a counter of prior State Grant awards. It is the total number of terms for all years for which the student received a State Grant award, not including the selected academic year.

The **Remedial Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

The **Winter** field displays term eligibility information, such as an award amount, reject and cancellation reason codes, and enrollment and housing status for the winter term.

School Portal Distance Education Partner Interface

NOTE: If the school user selected the student list for all terms, each term displays. Otherwise, only the selected term displays.

The **Rejects** field displays the reject code which represents the ineligibility reason(s). Select the student record to display the **Award** tab, which describes the meaning of the reject code(s).

3. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

Additional options display to export and view student records.

4. Click **Export to Excel/CSV** to export the student list. See user guide **WB0123-School Portal State Grant Partner Interface_User Guide_PHEAA** for more information about exporting the student list.
5. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.

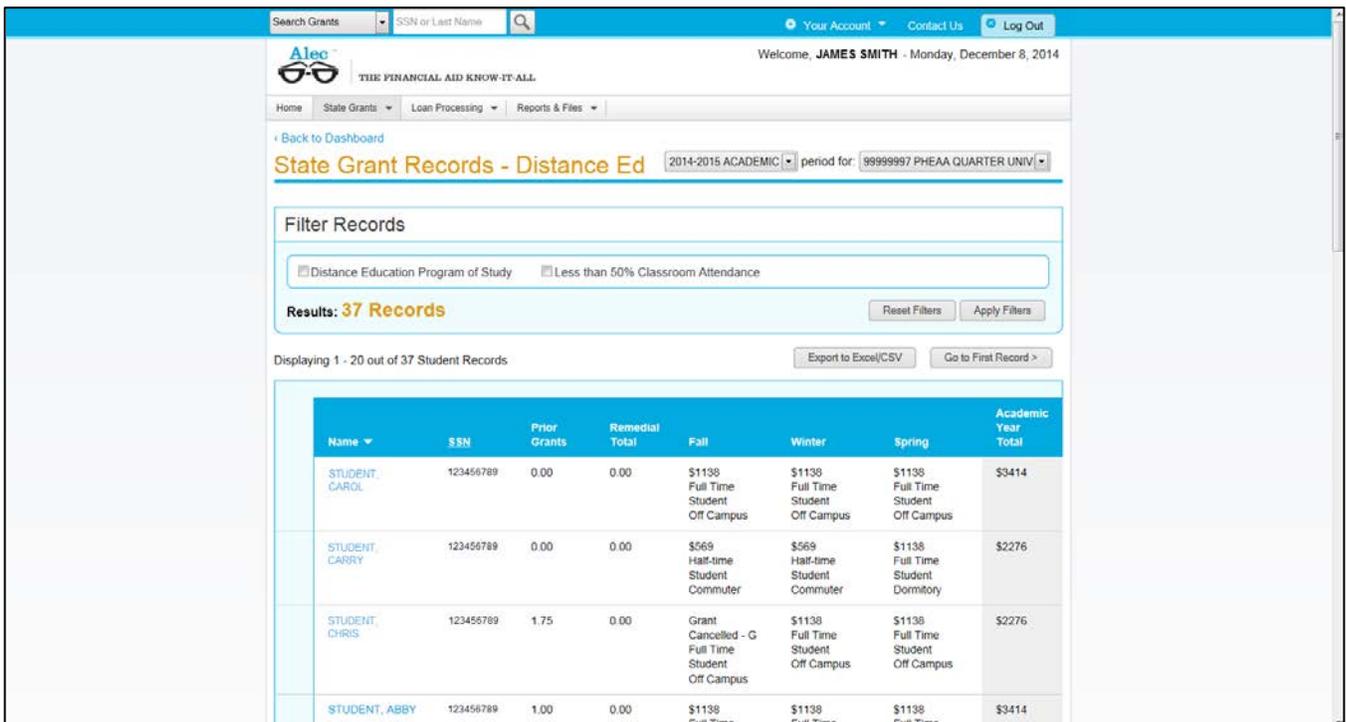
NOTE: Students on this list cannot be added to a mass update queue to be updated en masse. To change a student record, school users must update records individually. See [Update Distance Education Information on the Student Record](#) for step-by-step instructions.

School Portal Distance Education Partner Interface

Nominated Students Total

The **State Grant Records – Distance Ed** screen displays a list of all students who have been nominated for the Distance Education Pilot Program.

NOTE: This student list may be viewed by term and academic year. The spring term was selected in this example.



The screenshot shows the 'State Grant Records - Distance Ed' interface. It includes a search bar, navigation tabs, and a 'Filter Records' section with checkboxes for 'Distance Education Program of Study' and 'Less than 50% Classroom Attendance'. Below the filters, it displays 'Results: 37 Records' and a table of student records.

Name	SSN	Prior Grants	Remedial Total	Fall	Winter	Spring	Academic Year Total
STUDENT, CAROL	123456789	0.00	0.00	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$3414
STUDENT, CARRY	123456789	0.00	0.00	\$569 Half-time Student Commuter	\$569 Half-time Student Commuter	\$1138 Full Time Student Dormitory	\$2276
STUDENT, CHRIS	123456789	1.75	0.00	Grant Cancelled - G Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$2276
STUDENT, ABBY	123456789	1.00	0.00	\$1138 Full Time	\$1138 Full Time	\$1138 Full Time	\$3414

The following filter options are available in the **Filter Records** section to filter and sort the records in the **Student List**.

1. Check **Distance Education Program of Study** to filter the student list to display records where the student's program of study was incorrectly reported as **DE** (Distance Education) on the Student Record.

IMPORTANT! Students whose program of study is reported as **DE** (Distance Education) will not be processed for the Distance Education program. Before nominating students for the Distance Education program, school users must update the student's Program of Study from **DE** (Distance Education) to the actual Program of Study in which the student is enrolled.

2. Check **Less than 50% Classroom Attendance** to filter the student list to display records where at least one term of enrollment has been reported as **Less than 50% Classroom**.



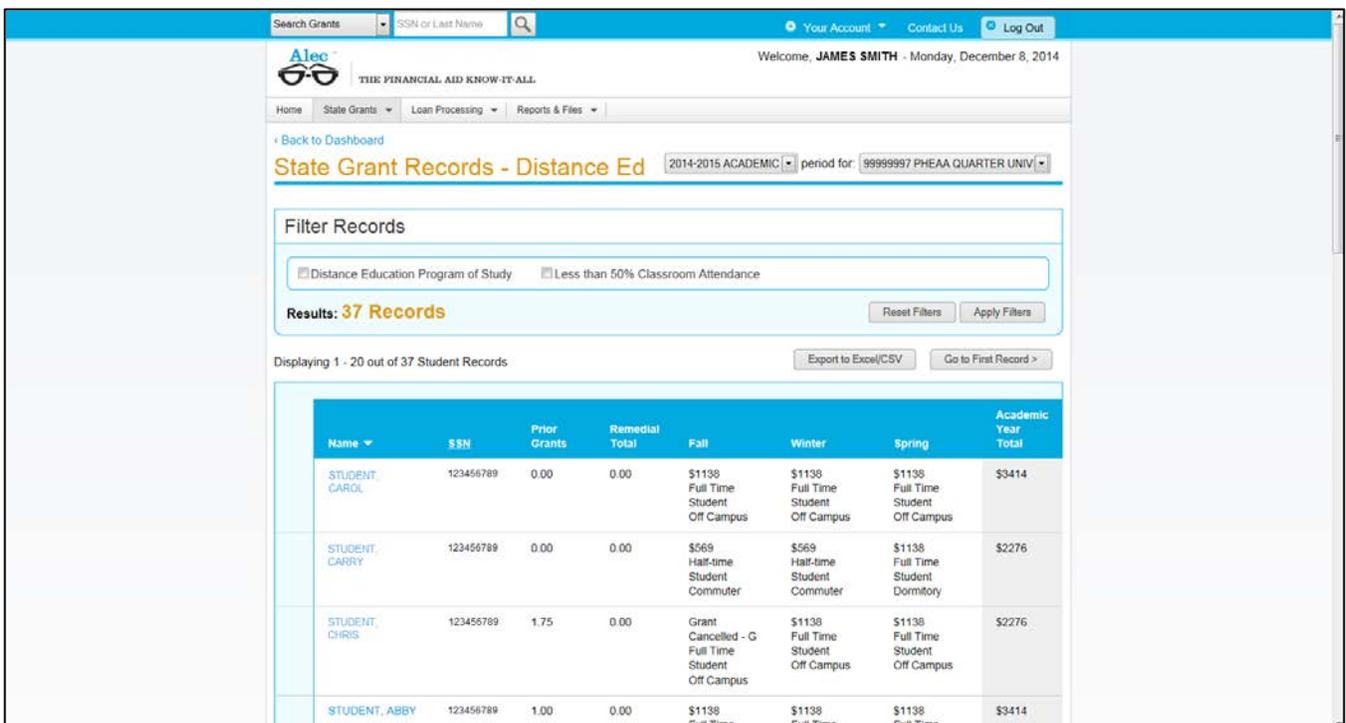
School Portal Distance Education Partner Interface

3. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.

School Portal Distance Education Partner Interface

➔ The **State Grant Records – Distance Ed** screen is updated to display only the records that match the filter options.

The number of records that meet the filter criteria displays in the **Results** field and the following message displays beneath the **Filter Records** section: **Displaying X – X out of X Student Records**.



The screenshot shows the 'State Grant Records - Distance Ed' interface. At the top, there is a search bar and navigation links. The main content area includes a 'Filter Records' section with checkboxes for 'Distance Education Program of Study' and 'Less than 50% Classroom Attendance'. Below the filters, it shows 'Results: 37 Records' and 'Displaying 1 - 20 out of 37 Student Records'. A table displays the following data:

Name	SSN	Prior Grants	Remedial Total	Fall	Winter	Spring	Academic Year Total
STUDENT, CAROL	123456789	0.00	0.00	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$3414
STUDENT, CARRY	123456789	0.00	0.00	\$569 Half-time Student Commuter	\$569 Half-time Student Commuter	\$1138 Full Time Student Dormitory	\$2276
STUDENT, CHRIS	123456789	1.75	0.00	Grant Cancelled - G Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$2276
STUDENT, ABBY	123456789	1.00	0.00	\$1138 Full Time	\$1138 Full Time	\$1138 Full Time	\$3414

The **Name** field displays the student's name.

NOTE: Records are sorted in alphabetical order by last name, then first name.

The **SSN** field displays the nine-digit Social Security number.

The **Prior Grants** field displays a counter of prior State Grant awards. It is the total number of terms for all years for which the student received a State Grant award, not including the selected academic year.

The **Remedial Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

The **Fall**, **Winter** and **Spring** fields display term eligibility information, such as an award amount, reject and cancellation reason codes, and enrollment and housing status for each term.

School Portal Distance Education Partner Interface

The **Academic Year Total** field displays the total academic year award amount for all terms.

4. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

Additional options display to export and view student records.

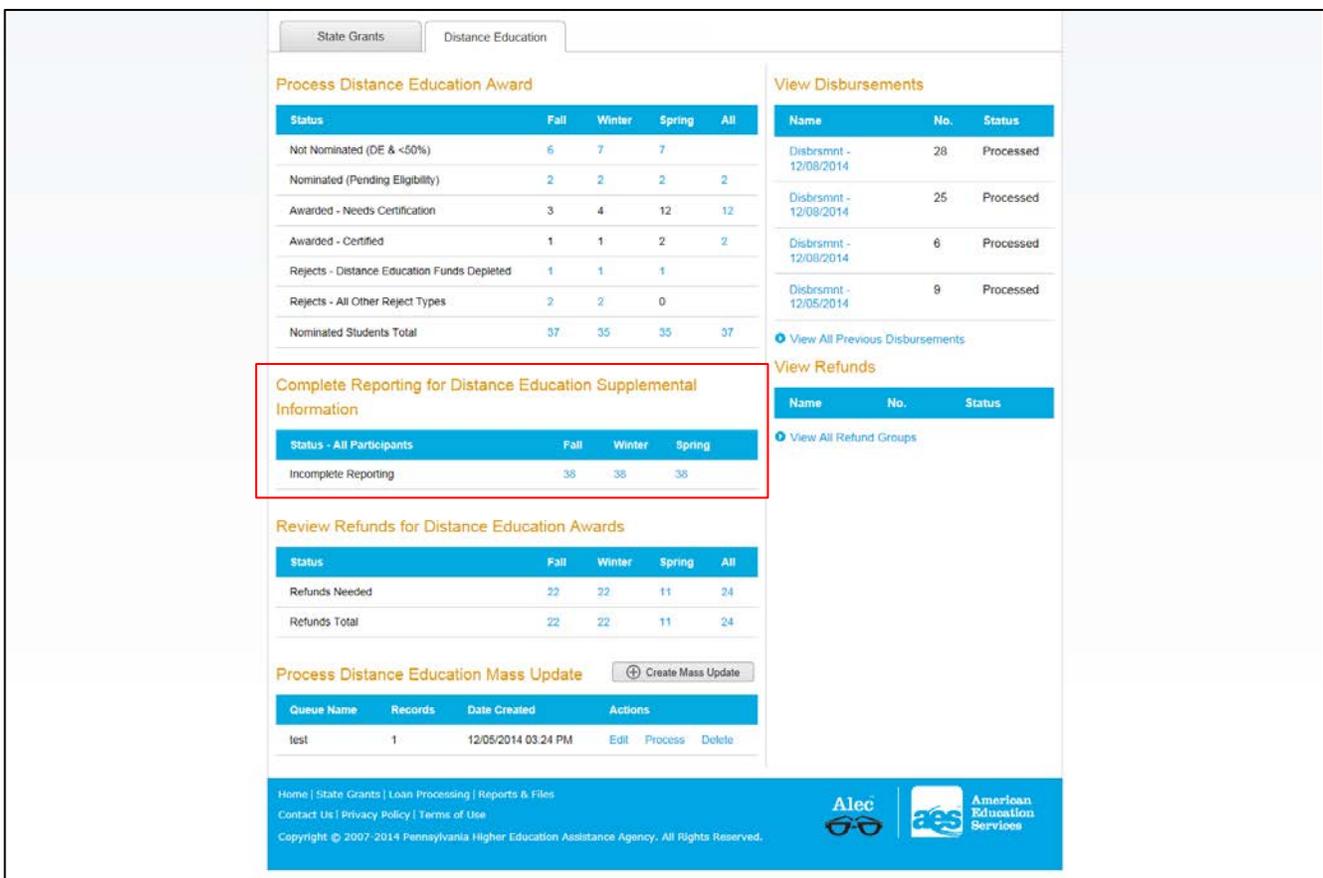
5. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the student list.
6. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: Students on this list cannot be added to a mass update queue to be updated en masse. To change a student record, school users must update records individually. See [Update Distance Education Information on the Student Record](#) for step-by-step instructions.

Complete Reporting for Distance Education Supplemental Information

The **Complete Reporting for Distance Education Supplemental Information** section displays a student list which displays records where required, student-level SGDEPP data is incomplete. Refer to the SGDEPP Program Guidelines on the PHEAA Web site for information about reporting requirements.

NOTE: This student list may be viewed only by term. The spring term was selected in this example.



The screenshot displays the 'Distance Education' section of the PHEAA School Portal. It features several data tables and navigation options. The 'Complete Reporting for Distance Education Supplemental Information' table is highlighted with a red box.

Status	Fail	Winter	Spring	All
Not Nominated (DE < 50%)	6	7	7	
Nominated (Pending Eligibility)	2	2	2	2
Awarded - Needs Certification	3	4	12	12
Awarded - Certified	1	1	2	2
Rejects - Distance Education Funds Depleted	1	1	1	
Rejects - All Other Reject Types	2	2	0	
Nominated Students Total	37	35	35	37

Status - All Participants	Fail	Winter	Spring
Incomplete Reporting	38	38	38

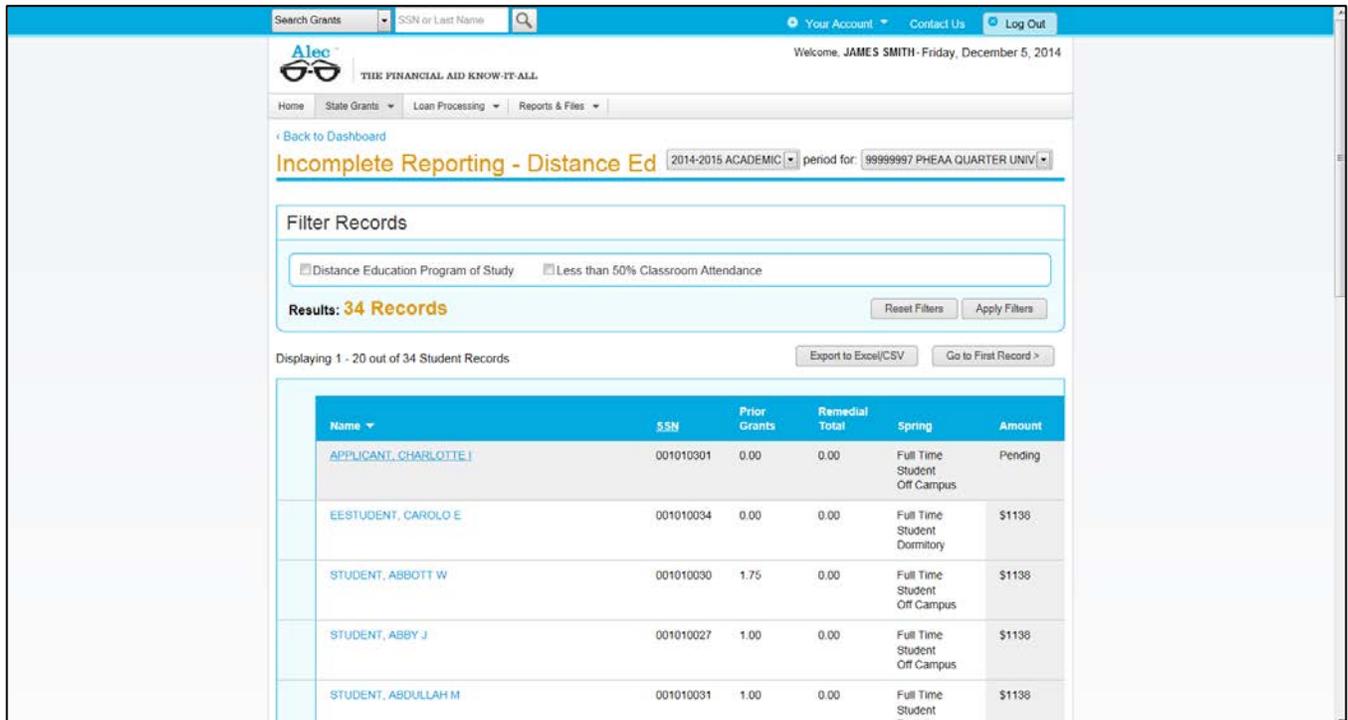
Status	Fail	Winter	Spring	All
Refunds Needed	22	22	11	24
Refunds Total	22	22	11	24

Queue Name	Records	Date Created	Actions
test	1	12/05/2014 03:24 PM	Edit Process Delete

1. Click the link in the desired term to view a Distance Education Student List for the selected term. The spring term is used in this example.

School Portal Distance Education Partner Interface

➔ The **Incomplete Reporting – Distance Ed** screen displays.



The screenshot shows the 'Incomplete Reporting - Distance Ed' screen. At the top, there is a search bar and navigation links. The main content area features a 'Filter Records' section with two filter options: Distance Education Program of Study and Less than 50% Classroom Attendance. Below the filters, it displays 'Results: 34 Records' and a table of student records. The table has columns for Name, SSN, Prior Grants, Remedial Total, Spring, and Amount.

Name	SSN	Prior Grants	Remedial Total	Spring	Amount
APPLICANT, CHARLOTTE I	001010301	0.00	0.00	Full Time Student Off Campus	Pending
EESTUDENT, CAROLO E	001010034	0.00	0.00	Full Time Student Dormitory	\$1138
STUDENT, ABBOTT W	001010030	1.75	0.00	Full Time Student Off Campus	\$1138
STUDENT, ABBY J	001010027	1.00	0.00	Full Time Student Off Campus	\$1138
STUDENT, ABDULLAH M	001010031	1.00	0.00	Full Time Student	\$1138

The following filter options are available in the **Filter Records** section to filter and sort the records in the **Student List**.

2. Check **Distance Education Program of Study** to filter the student list to display records where the student’s program of study was incorrectly reported as **DE** (Distance Education) on the Student Record.

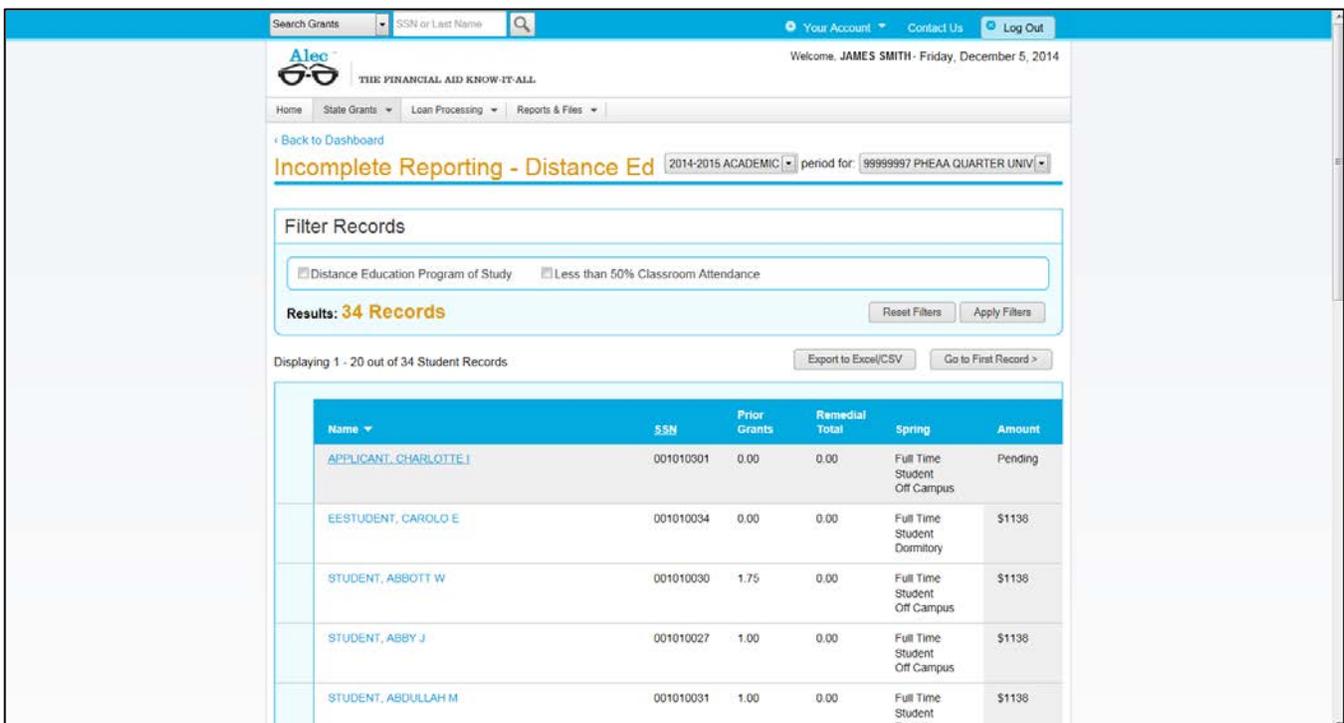
IMPORTANT! Students whose program of study is reported as **DE** (Distance Education) will not be processed for the Distance Education program. Before nominating students for the Distance Education program, school users must update the student’s Program of Study from **DE** (Distance Education) to the actual Program of Study in which the student is enrolled.

3. Check **Less than 50% Classroom Attendance** to filter the student list to display records where at least one term of enrollment has been reported as **Less than 50% Classroom**.
4. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.

School Portal Distance Education Partner Interface

➔ The **Incomplete Reporting – Distance Ed** screen is updated to display only the records that match the filter options.

The number of records that meet the filter criteria displays in the **Results** field and the following message displays beneath the **Filter Records** section: **Displaying X – X out of X Student Records**.



The screenshot shows the 'Incomplete Reporting - Distance Ed' interface. At the top, there is a search bar and navigation options. Below the search bar, the page title is 'Incomplete Reporting - Distance Ed' with filters for '2014-2015 ACADEMIC' and '9999997 PHEAA QUARTER UNIV'. A 'Filter Records' section contains two checkboxes: 'Distance Education Program of Study' and 'Less than 50% Classroom Attendance'. Below this, it shows 'Results: 34 Records' and buttons for 'Reset Filters' and 'Apply Filters'. A message indicates 'Displaying 1 - 20 out of 34 Student Records' with 'Export to Excel/CSV' and 'Go to First Record >' buttons. The main table lists student records with the following data:

Name	SSN	Prior Grants	Remedial Total	Spring	Amount
APPLICANT, CHARLOTTE I	001010301	0.00	0.00	Full Time Student Off Campus	Pending
EESTUDENT, CAROLO E	001010034	0.00	0.00	Full Time Student Dormitory	\$1138
STUDENT, ABBOTT W	001010030	1.75	0.00	Full Time Student Off Campus	\$1138
STUDENT, ABBY J	001010027	1.00	0.00	Full Time Student Off Campus	\$1138
STUDENT, ABDULLAH M	001010031	1.00	0.00	Full Time Student	\$1138

The **Name** field displays the student’s name.

NOTE: Records are sorted in alphabetical order by last name, then first name.

The **SSN** field displays the nine-digit Social Security number.

The **Prior Grants** field displays a counter of prior State Grant awards. It is the total number of terms for all years for which the student received a State Grant award, not including the selected academic year.

The **Remedial Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

The **Spring** field display term eligibility information, such as an award amount, reject and cancellation reason codes, and enrollment and housing status for the spring term.

School Portal Distance Education Partner Interface

The **Amount** field displays the award amount for the spring term.

NOTE: The **Academic Year Total** field, not shown, displays the total academic year award amount if the school user selected the student list for all terms.

5. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

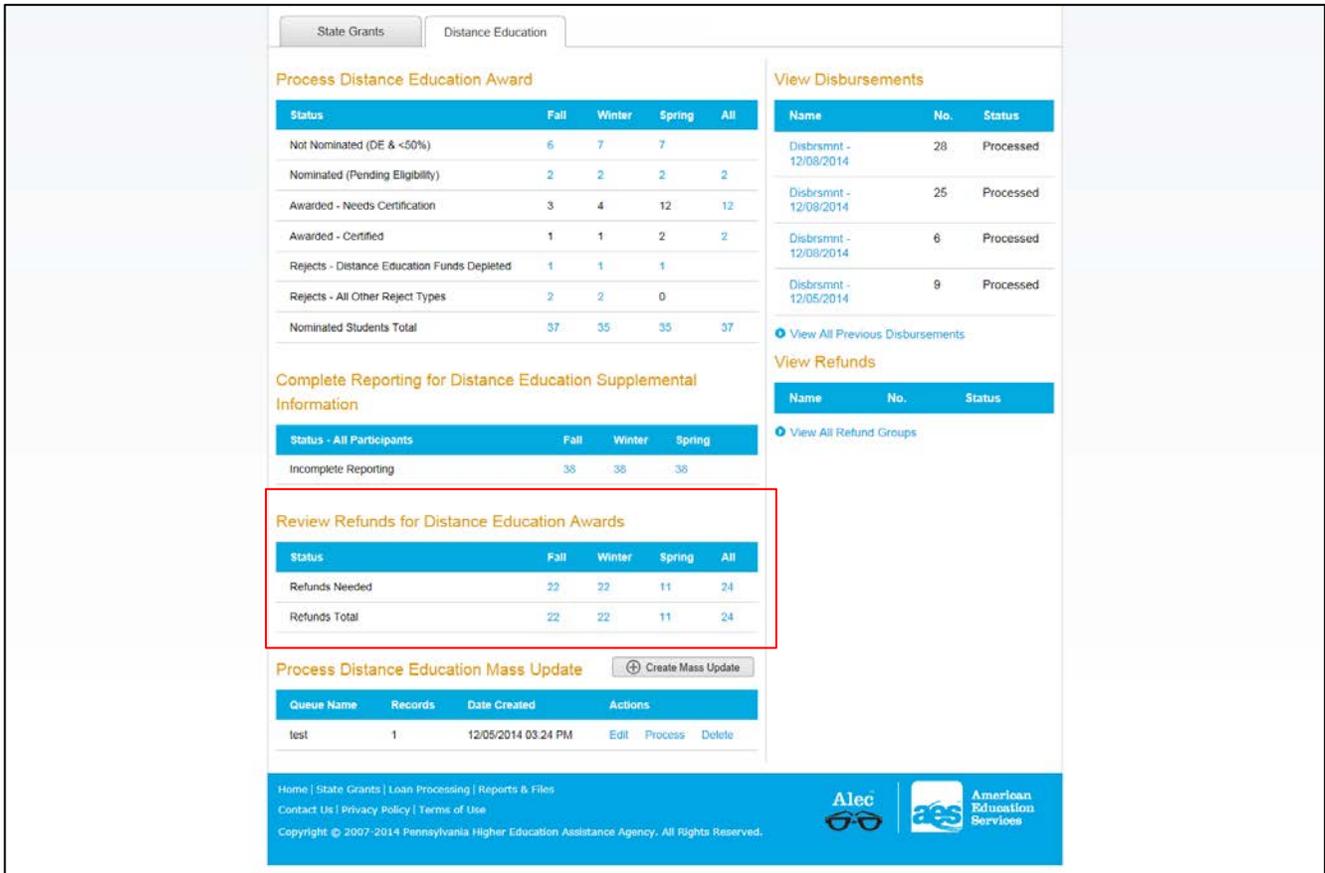
Additional options display to export and view student records.

6. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the student list.
7. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: Students on this list cannot be added to a mass update queue to be updated en masse. To change a student record, school users must update records individually. See [Update Distance Education Information on the Student Record](#) for step-by-step instructions.

Review Refunds for Distance Education Awards

The **Review Refunds for Distance Education Awards** section displays records that were identified as a “PHEAA Refund Outstanding” as of the date the last disbursement roster was generated.



The screenshot displays the 'Distance Education' section of the PHEAA School Portal. It includes several data tables and navigation options:

- Process Distance Education Award:** A table showing student status across terms (Fall, Winter, Spring, All).
- Complete Reporting for Distance Education Supplemental Information:** A table showing incomplete reporting counts.
- Review Refunds for Distance Education Awards:** A table showing the number of refunds needed and total refunds across terms. This section is highlighted with a red box in the original image.
- Process Distance Education Mass Update:** A table showing a queue of mass update records.
- View Disbursements:** A table listing disbursement records with names, counts, and statuses.
- View Refunds:** A table listing refund groups.

1. Click the link in the desired term to view a Distance Education Student List for the selected term, or click the link in the **All** column to view a Distance Education Student List for the academic year.

See the following sections for more information:

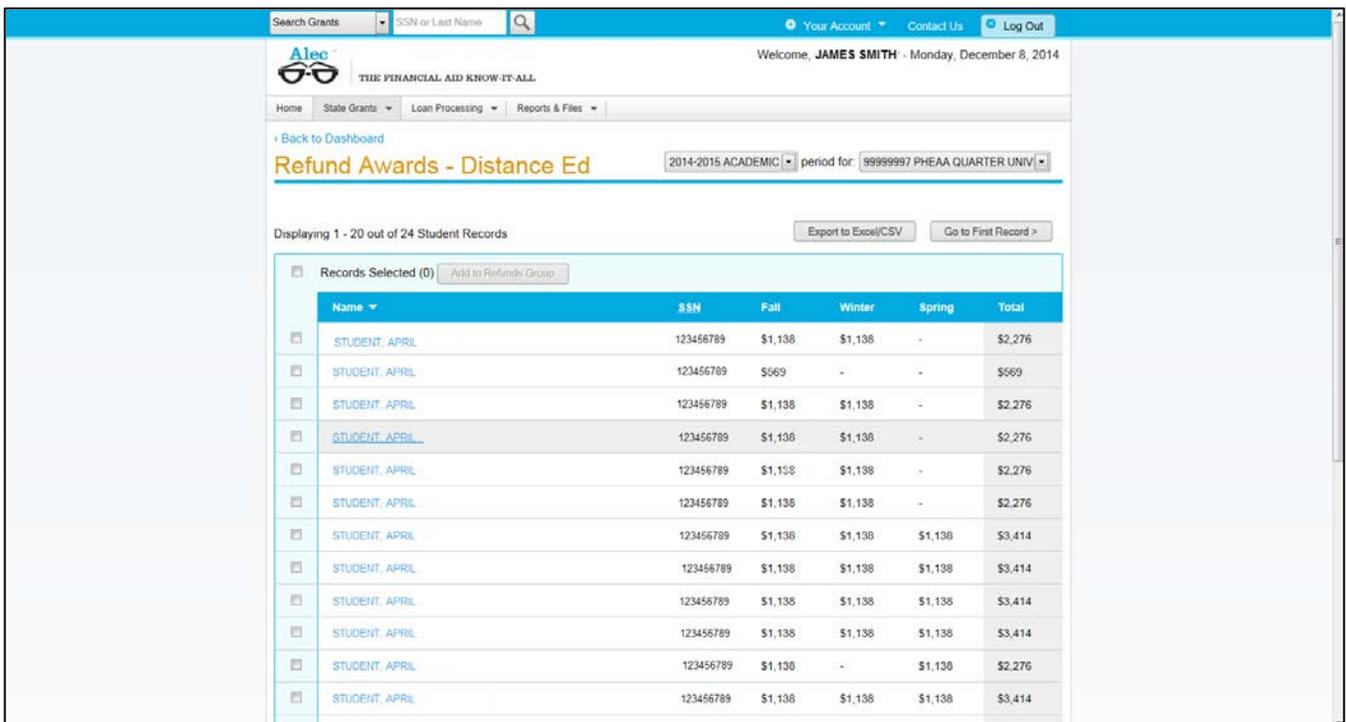
- [Refunds Needed](#)
- [Refunds Total](#)

School Portal Distance Education Partner Interface

Refunds Needed

The **Refund Awards – Distance Ed** screen displays a list of students for whom refunds are needed as of the date the last disbursement roster was generated. This list displays the total of all refunds outstanding that have not been added to a refunds group, or invoice. Adding a refund to a refund group, or invoice, is not an indication that PHEAA has received payment. Please refer to the [View Refunds](#) section for more information about the status of payments.

NOTE: This student list may be viewed by term and by academic year. **All** was selected in this example.



Name	SSN	Fall	Winter	Spring	Total
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$569	-	-	\$569
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414
STUDENT, APRIL	123456789	\$1,138	-	\$1,138	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414

The **Name** field displays the student’s name.

NOTE: Records are sorted in alphabetical order by last name, then first name.

The **SSN** field displays the nine-digit Social Security number.

The **Fall**, **Winter** and **Spring** fields display the outstanding refund amounts for each term.

NOTE: All terms were selected in this example. If the school user selected the student list for a term, only the selected term displays.

The **Total** field displays the total outstanding refund amount for all terms.

School Portal Distance Education Partner Interface

NOTE: The **Amount** field, not shown, displays the outstanding refund amount of the selected term if the school user selected a term.

1. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

Additional options display to export and view student records, and to add student records to a refund group.

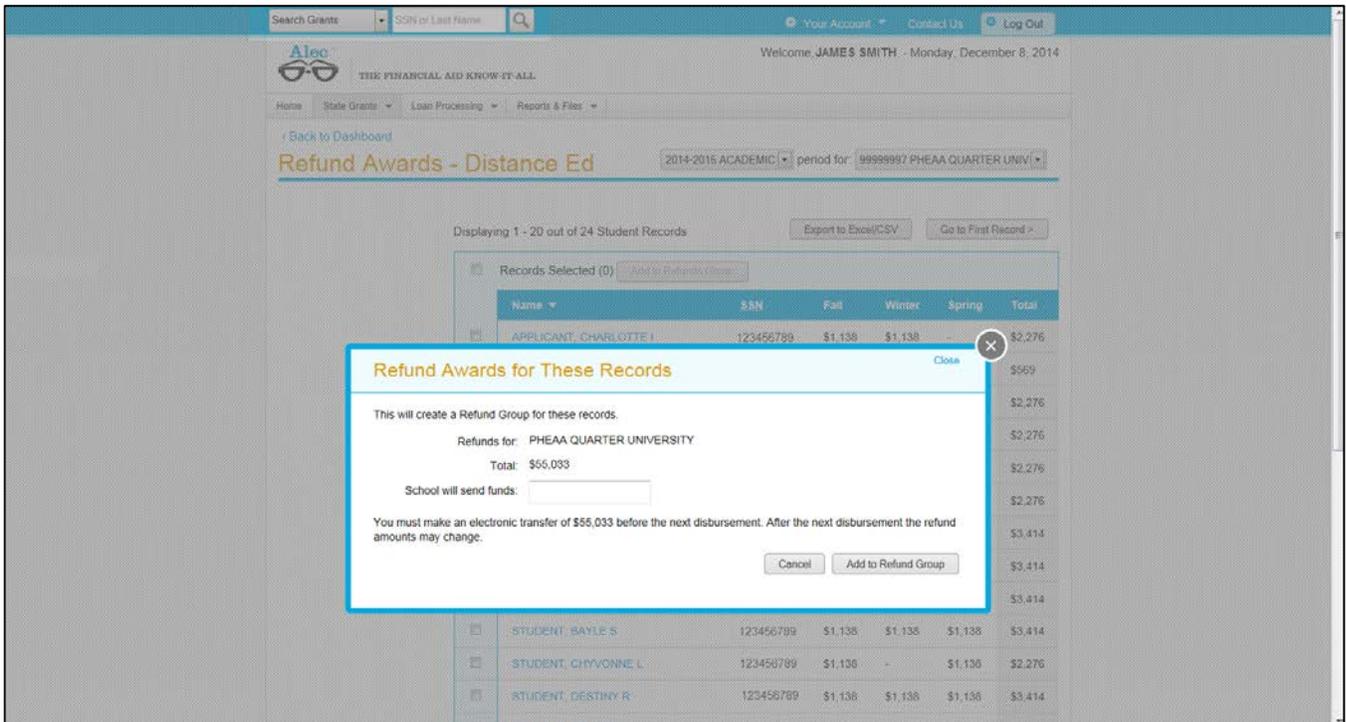
2. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the student list.
3. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.
4. To select one or more records to add to a refunds group, check the boxes to the left of the **Name** field. To select all records on the page, check the box in the header.

NOTE: There is no maximum to the number of records that may be added to the refund group. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records.

5. Click **Add to Refunds Group** to add the selected record(s) to a refunds group, or invoice.

School Portal Distance Education Partner Interface

➔ The **Refund Awards for These Records** dialog box displays.



The **Refunds for** field displays the name of the school that is sending the refund.

The **Total** field displays the total amount of the refund, which is the total of all records selected for the refund group.

6. In the **School will send funds** field, enter the date the school will send the refunds in MM/DD/YYYY format. This date must be on or after the current date.
7. Click **Add to Refund Group**.

School Portal Distance Education Partner Interface

➔ The **Refund Awards – Distance Ed** screen redisplay with the following message: **(X) records were successfully added to Refund Group.**

NOTE: **(X)** indicates the number of records added to the Refund Group.

The screenshot shows the Alec School Portal interface. At the top, there is a navigation bar with 'Search Grants', 'SSN or Last Name', and a search icon. The user is logged in as 'JAMES SMITH' on Monday, December 8, 2014. The main content area displays a message: '(3) records were successfully added to Refund Group.' Below this message is a 'View Refund Group' link. A table titled 'Displaying 1 - 3 out of 3 Student Records' is shown, with columns for Name, SSN, Fall, Winter, Spring, and Total. The table contains three rows of student records.

Name	SSN	Fall	Winter	Spring	Total
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$569	-	-	\$569
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276

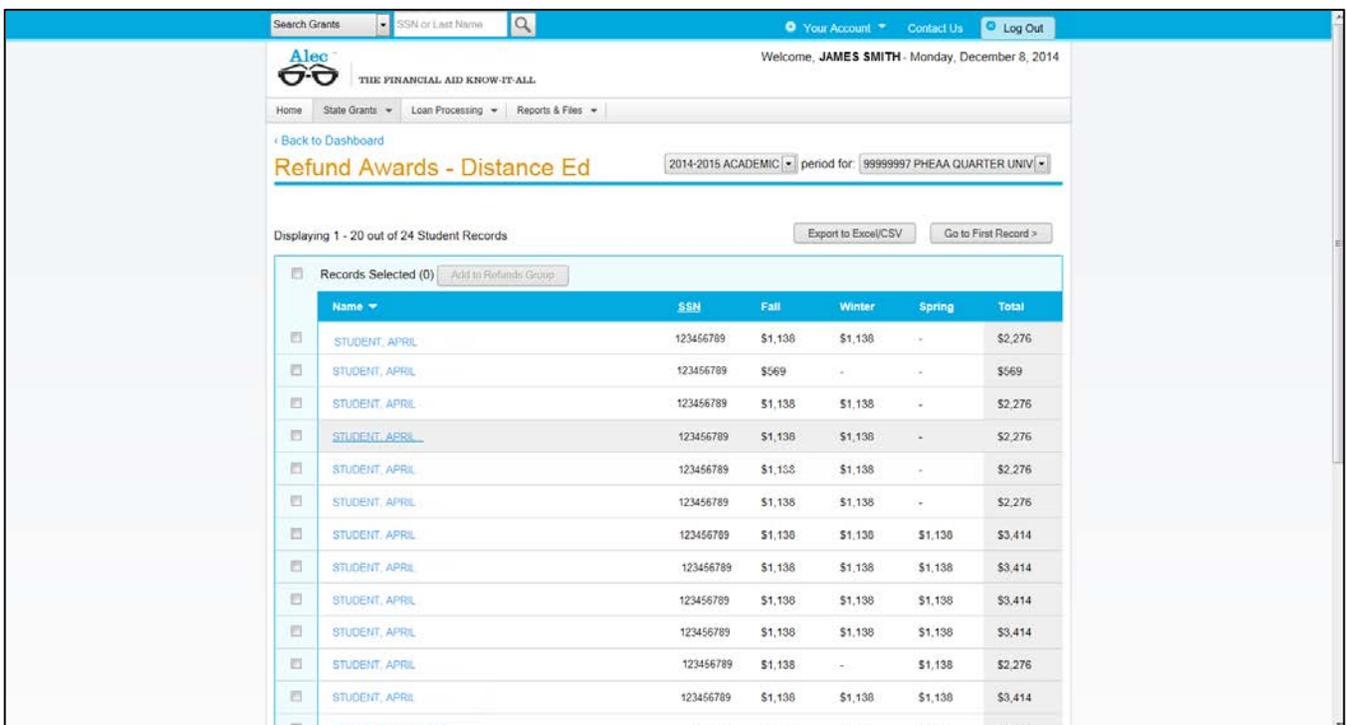
See [View Refunds](#) for more information about the Refund Groups.

School Portal Distance Education Partner Interface

Refunds Total

The **Refund Awards – Distance Ed** screen displays a list of students that were identified as a “PHEAA Refund Outstanding” as of the date the last disbursement roster was generated. This list displays the total of all refunds outstanding—whether they are on an invoice or not—until the refund is processed.

NOTE: This student list may be viewed by term and by academic year. **All** was selected in this example.



Name	SSN	Fall	Winter	Spring	Total
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$569	-	-	\$569
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414
STUDENT, APRIL	123456789	\$1,138	-	\$1,138	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414

The **Name** field displays the student’s name.

NOTE: Records are sorted in alphabetical order by last name, then first name.

The **SSN** field displays the nine-digit Social Security number.

The **Fall**, **Winter** and **Spring** fields display the outstanding refund amounts for each term.

NOTE: All terms were selected in this example. If the school user selected the student list for a term, only the selected term displays.

The **Total** field displays the total outstanding refund amount for all terms.

School Portal Distance Education Partner Interface

NOTE: The **Amount** field, not shown, displays the outstanding refund amount of the selected term if the school user selected a term.

1. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

Additional options display to export and view student records, and to add student records to a refund group.

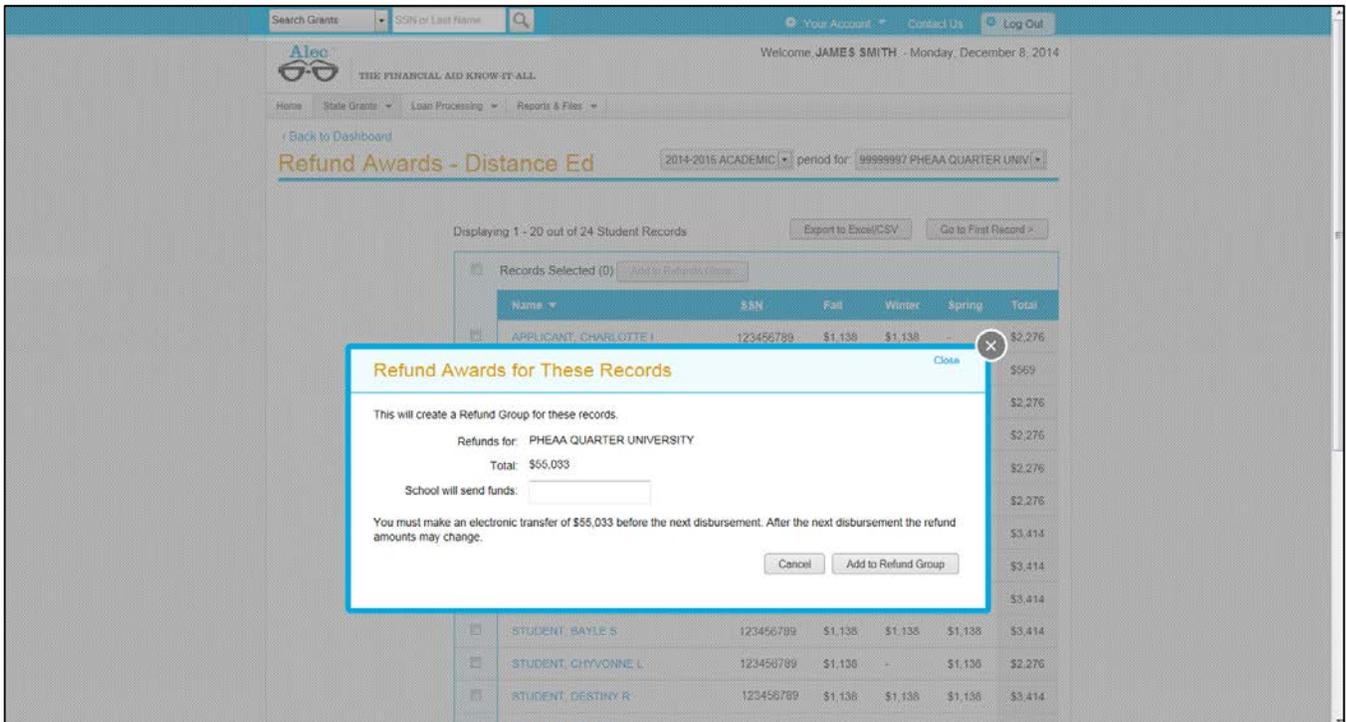
2. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the student list.
3. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.
4. To select one or more records to add to a refunds group, check the boxes to the left of the **Name** field. To select all records on the page, check the box in the header.

NOTE: There is no maximum to the number of records that may be added to the refund group. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records.

5. Click **Add to Refunds Group** to add the selected record(s) to a refunds group, or invoice.

School Portal Distance Education Partner Interface

➡ The **Refunds for These Records** dialog box displays.



The **Refunds for** field displays the name of the school that is sending the refund.

The **Total** field displays the total amount of the refund, which is the total of all records selected for the refund group.

- In the **School will send funds** field, enter the date the school will send the refunds in MM/DD/YYYY format. This date must be on or after the current date.
- Click **Add to Refund Group**.

School Portal Distance Education Partner Interface

➡ The **Refund Awards – Distance Ed** screen redisplay with the following message: **(X)** records were successfully added to Refund Group.

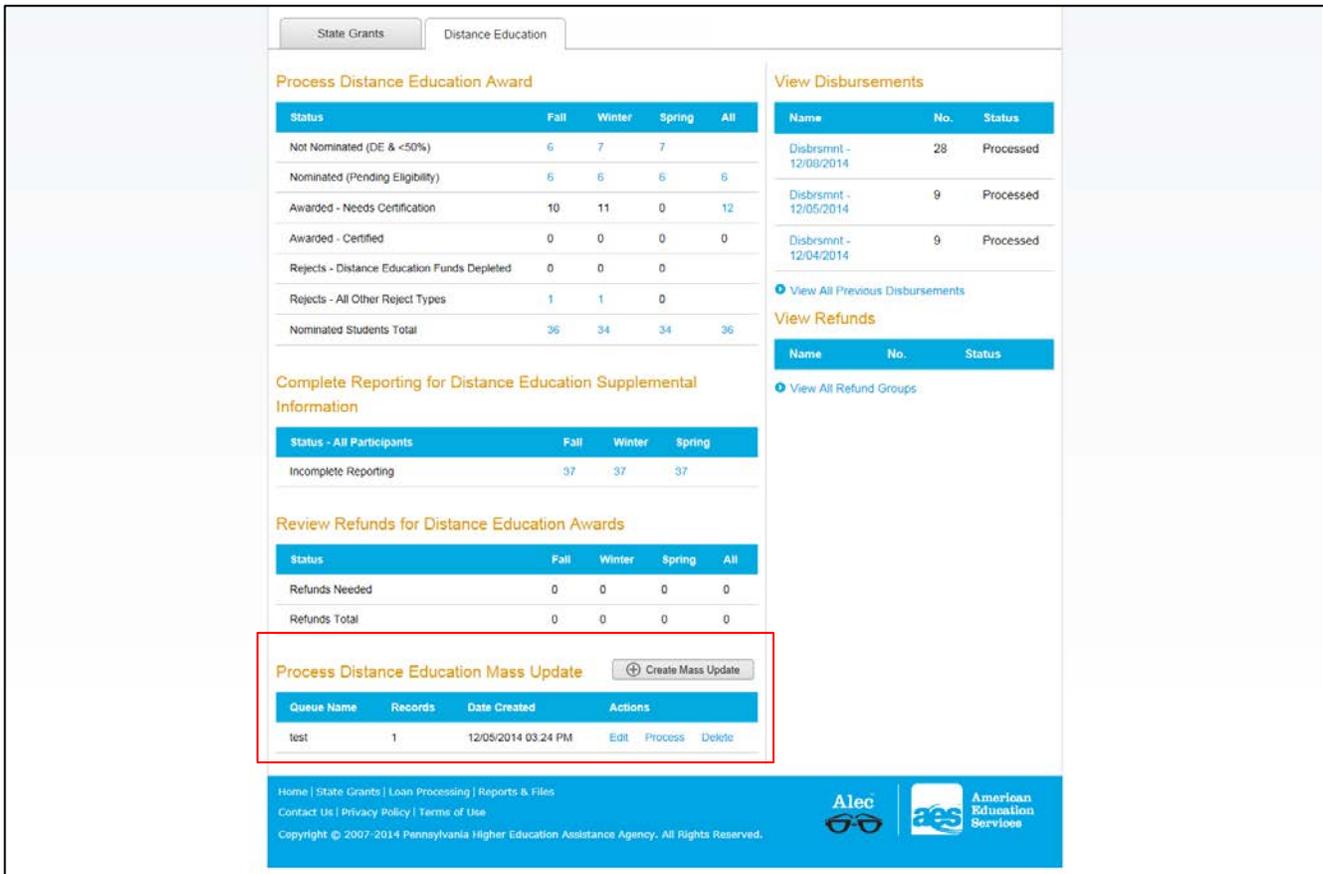
NOTE: **(X)** indicates the number of records added to the Refund Group. **(P)** (Pending) displays next to the refund amount.

The screenshot shows the Alec School Portal interface. At the top, there is a navigation bar with 'Search Grants', 'SSN or Last Name', and 'Your Account'. The main header includes the Alec logo and 'THE FINANCIAL AID KNOW-IT-ALL'. A welcome message for JAMES SMITH is displayed. The page title is 'Refund Awards - Distance Ed' for the 2014-2015 ACADEMIC period. A yellow message box states '(3) records were successfully added to Refund Group.' Below this, a table displays 3 student records. The table has columns for Name, SSN, Fall, Winter, Spring, and Total. The records show varying refund amounts for different semesters, with some having pending amounts (P).

Name	SSN	Fall	Winter	Spring	Total
STUDENT, APRIL	123456789	\$1,138 (P)	\$1,138 (P)	-	\$2,276
STUDENT, APRIL	123456789	\$1,138 (P)	\$1,138 (P)	-	\$2,276
STUDENT, APRIL	123456789	\$1,138 (P)	\$1,138 (P)	-	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	-	\$2,276
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414
STUDENT, APRIL	123456789	\$1,138	\$1,138	\$1,138	\$3,414

See [View Refunds](#) for more information about the Refund Groups.

Process Distance Education Mass Update Queue



The screenshot displays the 'Distance Education' section of the interface. It includes several data tables and action buttons. A red box highlights the 'Process Distance Education Mass Update' section, which contains a 'Create Mass Update' button and a table with one record.

Status	Fall	Winter	Spring	All
Not Nominated (DE & <50%)	6	7	7	
Nominated (Pending Eligibility)	6	6	6	6
Awarded - Needs Certification	10	11	0	12
Awarded - Certified	0	0	0	0
Rejects - Distance Education Funds Depleted	0	0	0	
Rejects - All Other Reject Types	1	1	0	
Nominated Students Total	36	34	34	36

Name	No.	Status
Disbrsmnt - 12/08/2014	28	Processed
Disbrsmnt - 12/05/2014	9	Processed
Disbrsmnt - 12/04/2014	9	Processed

Status - All Participants	Fall	Winter	Spring
Incomplete Reporting	37	37	37

Status	Fall	Winter	Spring	All
Refunds Needed	0	0	0	0
Refunds Total	0	0	0	0

Queue Name	Records	Date Created	Actions
test	1	12/05/2014 03:24 PM	Edit Process Delete

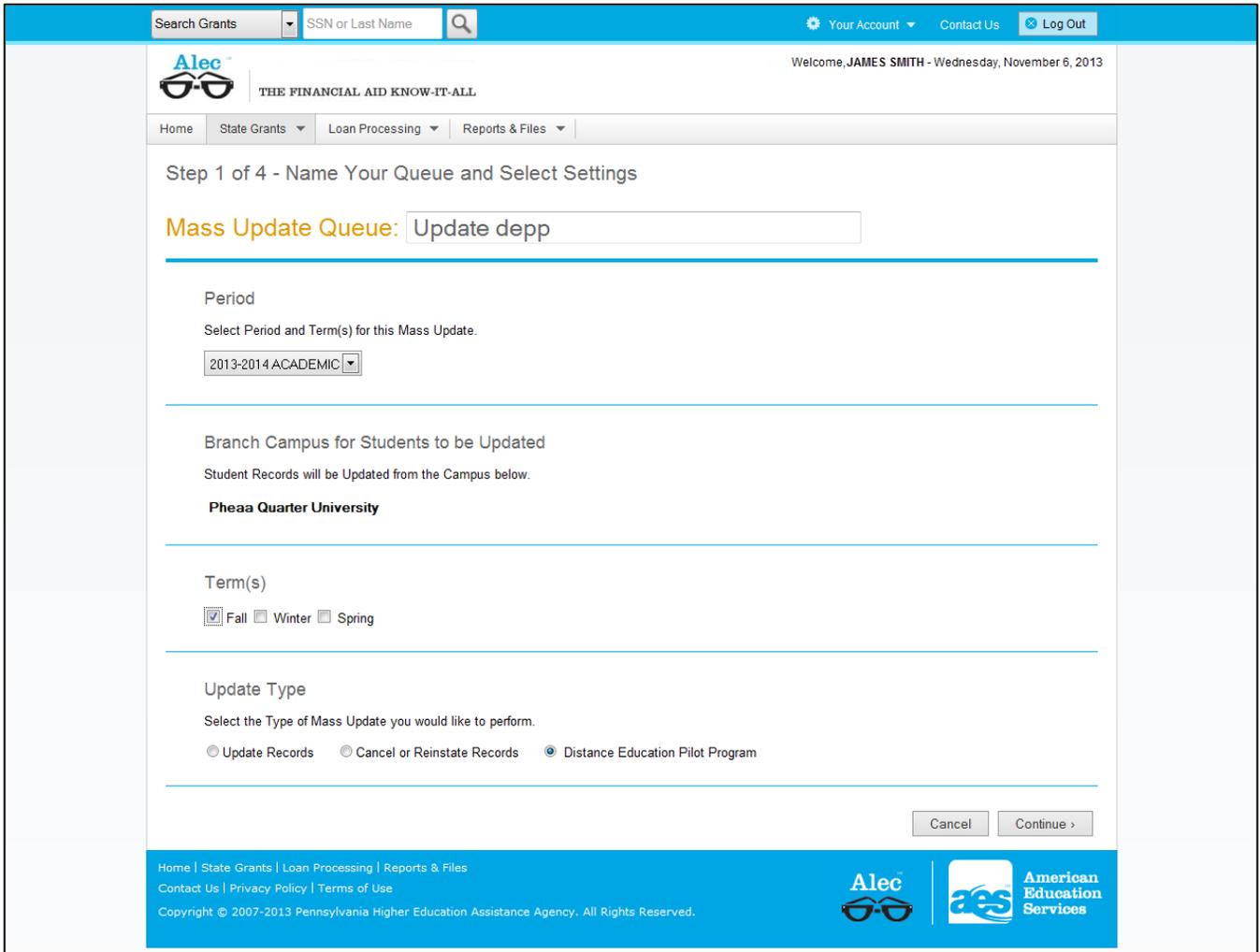
1. Click **Create Mass Update**, **Edit**, **Process** or **Delete** to create a new mass update queue or to edit, process or delete an unprocessed queue.

See the following sections for step-by-step instructions:

- [Create Distance Education Mass Update Queue](#)
- [Edit Distance Education Mass Update Queue](#)
- [Process Distance Education Mass Update Queue](#)
- [Delete Distance Education Mass Update Queue](#)

Create Distance Education Mass Update Queue

Distance Education Pilot Program queues are used to update student records with distance education pilot program information.



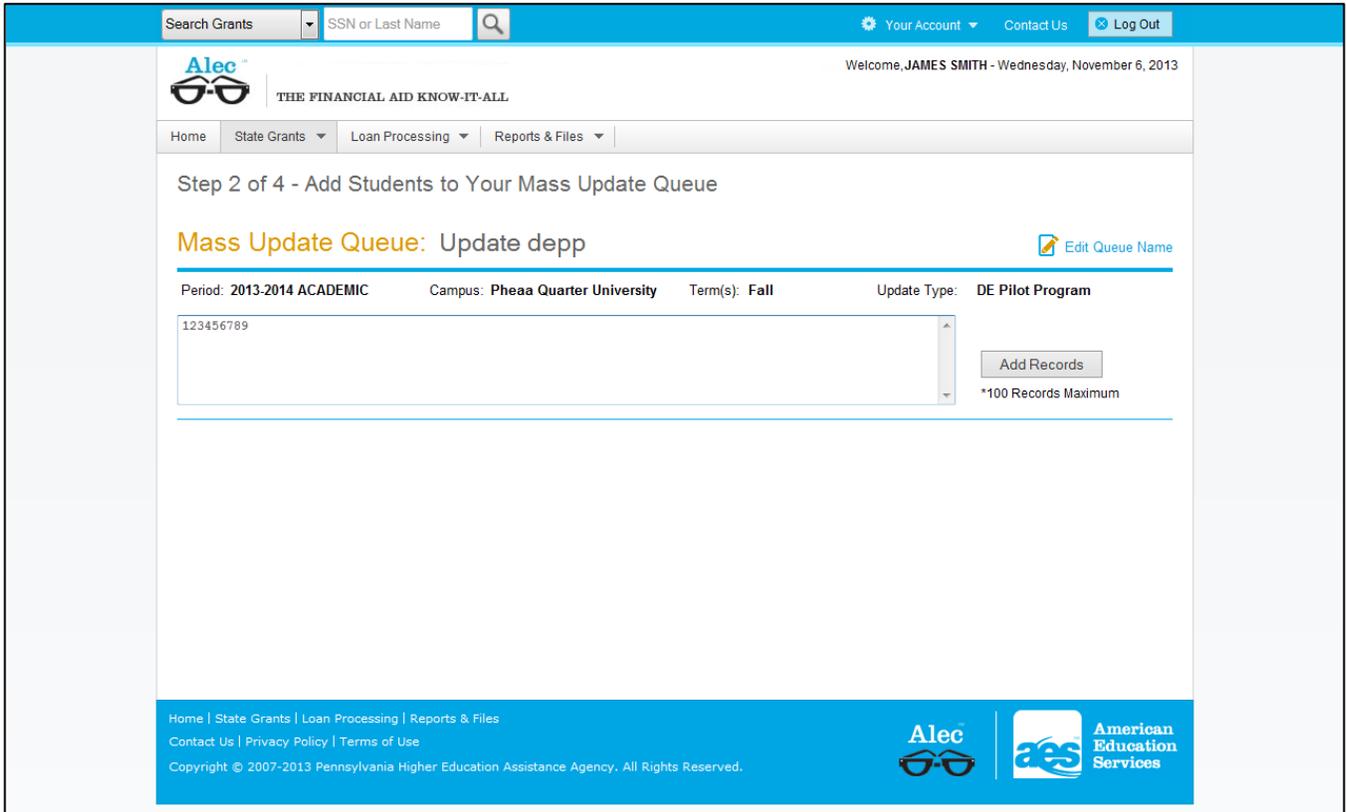
The screenshot shows the Alec web portal interface. At the top, there is a search bar for grants and a navigation menu with options like 'Your Account', 'Contact Us', and 'Log Out'. The main content area is titled 'Step 1 of 4 - Name Your Queue and Select Settings'. It features a text input field for the 'Mass Update Queue' name, which contains 'Update depp'. Below this, there are sections for 'Period' (a dropdown menu set to '2013-2014 ACADEMIC'), 'Branch Campus for Students to be Updated' (a dropdown menu set to 'Pheaa Quarter University'), 'Term(s)' (checkboxes for 'Fall', 'Winter', and 'Spring', with 'Fall' selected), and 'Update Type' (radio buttons for 'Update Records', 'Cancel or Reinststate Records', and 'Distance Education Pilot Program', with the last one selected). At the bottom right of the form, there are 'Cancel' and 'Continue >' buttons. The footer contains navigation links, the Alec logo, the American Education Services logo, and copyright information.

1. In the **Update Type** field, click **Distance Education Pilot Program**.
2. Click **Continue**.

NOTE: For instructions on creating a mass update queue to update, cancel or reinstate student records, see user guide **WB0123- School Portal State Grant Partner Interface_User Guide_PHEAA**.

School Portal Distance Education Partner Interface

➔ The **Step 2 of 4 – Add Students to Your Mass Updates Queue** page displays.



Search Grants [SSN or Last Name] [Search]

Your Account [Settings] Contact Us [Log Out]

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Step 2 of 4 - Add Students to Your Mass Update Queue

Mass Update Queue: Update depp [Edit Queue Name](#)

Period: 2013-2014 ACADEMIC Campus: Pheaa Quarter University Term(s): Fall Update Type: DE Pilot Program

123456789

*100 Records Maximum

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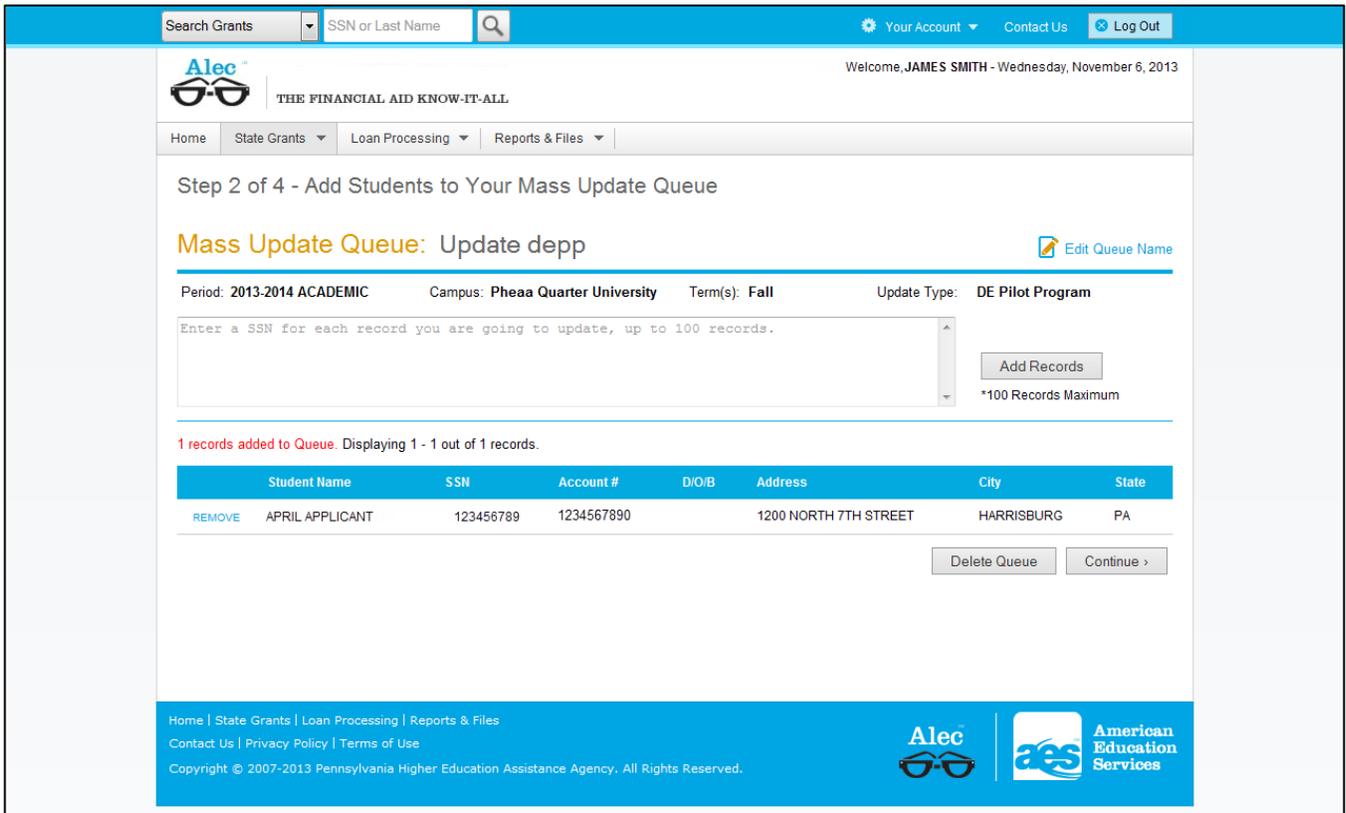
The **Mass Update Queue** field displays the name of the queue entered on the previous page. To change the name of the queue, click **Edit Queue Name**.

The **Period**, **Campus**, **Term(s)** and **Update Type** fields display the information that was entered on the previous page.

3. In the text box, enter SSNs for each record that should be updated, up to **100** records. The SSN must be numeric. It may contain dashes. Use commas, spaces, returns or tabs to separate more than one SSN.
4. Click **Add Records**.

School Portal Distance Education Partner Interface

➡ The **Step 2 of 4 – Add Students to Your Mass Updates Queue** page redisplay with the list of student records that have been added to the queue.



Search Grants | SSN or Last Name | Your Account | Contact Us | Log Out

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Step 2 of 4 - Add Students to Your Mass Update Queue

Mass Update Queue: Update depp [Edit Queue Name](#)

Period: 2013-2014 ACADEMIC | Campus: Pheaa Quarter University | Term(s): Fall | Update Type: DE Pilot Program

Enter a SSN for each record you are going to update, up to 100 records.

*100 Records Maximum

1 records added to Queue. Displaying 1 - 1 out of 1 records.

	Student Name	SSN	Account #	D/O/B	Address	City	State
REMOVE	APRIL APPLICANT	123456789	1234567890		1200 NORTH 7TH STREET	HARRISBURG	PA

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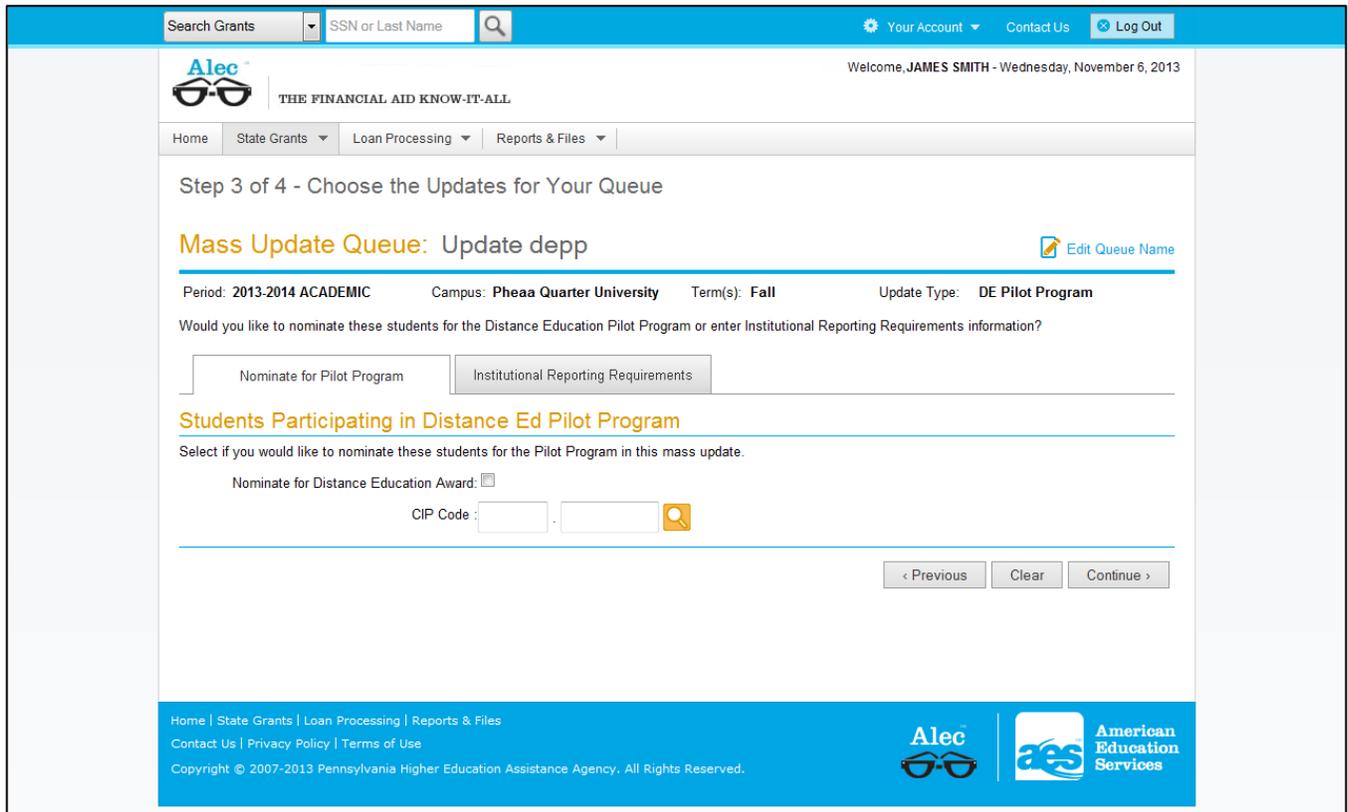
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- To remove records, check one or more boxes to the left of the student record and click **Remove**.
- Click **Continue**. To delete the queue, click **Delete Queue**.

NOTE: If the school user clicks **Delete Queue**, the **Delete Queue** dialog box displays, not shown. Click **Yes, Delete Queue** to confirm the deletion.

School Portal Distance Education Partner Interface

➔ The **Step 3 of 4 – Choose the Updates for Your Queue** page displays.



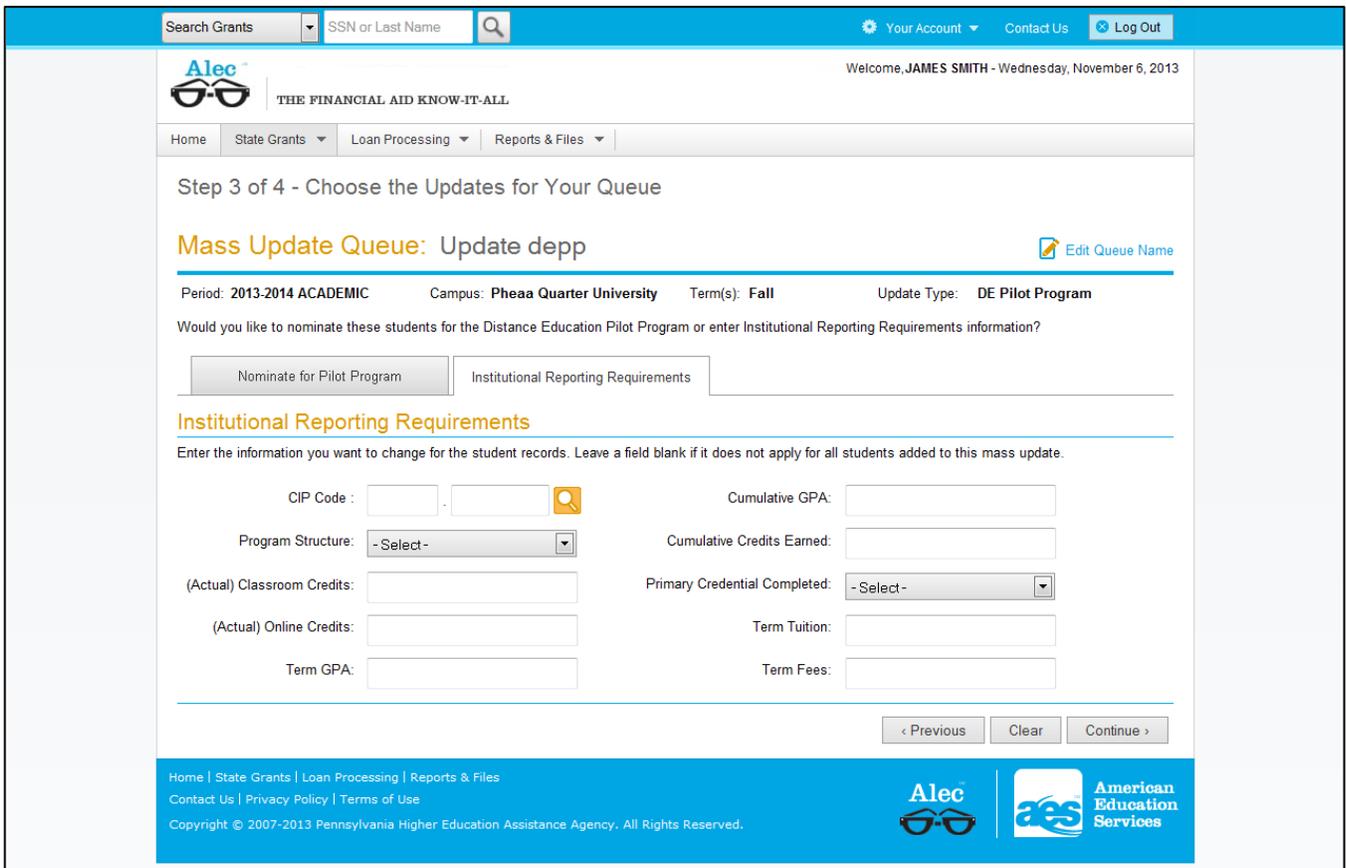
The **Mass Update Queue** field displays the name of the queue entered on the previous page. To change the name of the queue, click **Edit Queue Name**.

The **Period**, **Campus**, **School**, **Term(s)** and **Update Type** fields display the information that was entered in step one.

Nomination for Pilot Program

7. Check **Nominate for Distance Education Award** to nominate the student(s) in the queue for the Distance Education Award. *This is a required field.*
8. In the **CIP Code** (Classification of Instructional Program) field, enter the two- and four-character CIP code, or click the magnifying glass to the right of the field and select the two- and four-character CIP codes from the **Approved Programs** list. This field is dynamic, meaning that the codes that display in the second part of the field depend on the code that is selected in the first part of the field. *Both parts of this field are required.*
9. Click the **Institutional Reporting Requirements** tab to update additional fields.

Institutional Reporting Requirements



Search Grants [SSN or Last Name] [Search] [Your Account] [Contact Us] [Log Out]

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Step 3 of 4 - Choose the Updates for Your Queue

Mass Update Queue: Update depp [Edit Queue Name]

Period: 2013-2014 ACADEMIC Campus: Pheaa Quarter University Term(s): Fall Update Type: DE Pilot Program

Would you like to nominate these students for the Distance Education Pilot Program or enter Institutional Reporting Requirements information?

[Nominate for Pilot Program] [Institutional Reporting Requirements]

Institutional Reporting Requirements

Enter the information you want to change for the student records. Leave a field blank if it does not apply for all students added to this mass update.

CIP Code: [] - [] [Magnifying Glass] Cumulative GPA: []

Program Structure: [- Select -] Cumulative Credits Earned: []

(Actual) Classroom Credits: [] Primary Credential Completed: [- Select -]

(Actual) Online Credits: [] Term Tuition: []

Term GPA: [] Term Fees: []

[< Previous] [Clear] [Continue >]

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10. In the **CIP Code** (Classification of Instructional Program) field, enter the two- and four-character CIP code, or click the magnifying glass to the right of the field and select the two- and four-character CIP codes from the **Approved Programs** list. This field is dynamic, meaning that the codes that display in the second part of the field depend on the code that is selected in the first part of the field. *Both parts of this field are required.*
11. In the **Program Structure** field, click the down arrow and select the distance education composition of the student's program of study.
12. In the **(Actual) Classroom Credits** field, enter the number of credits the student has successfully completed in a classroom.
13. In the **(Actual) Online Credits** field, enter the number of credits the student has successfully completed online.
14. In the **Term GPA** field, enter the student's grade point average for the term.

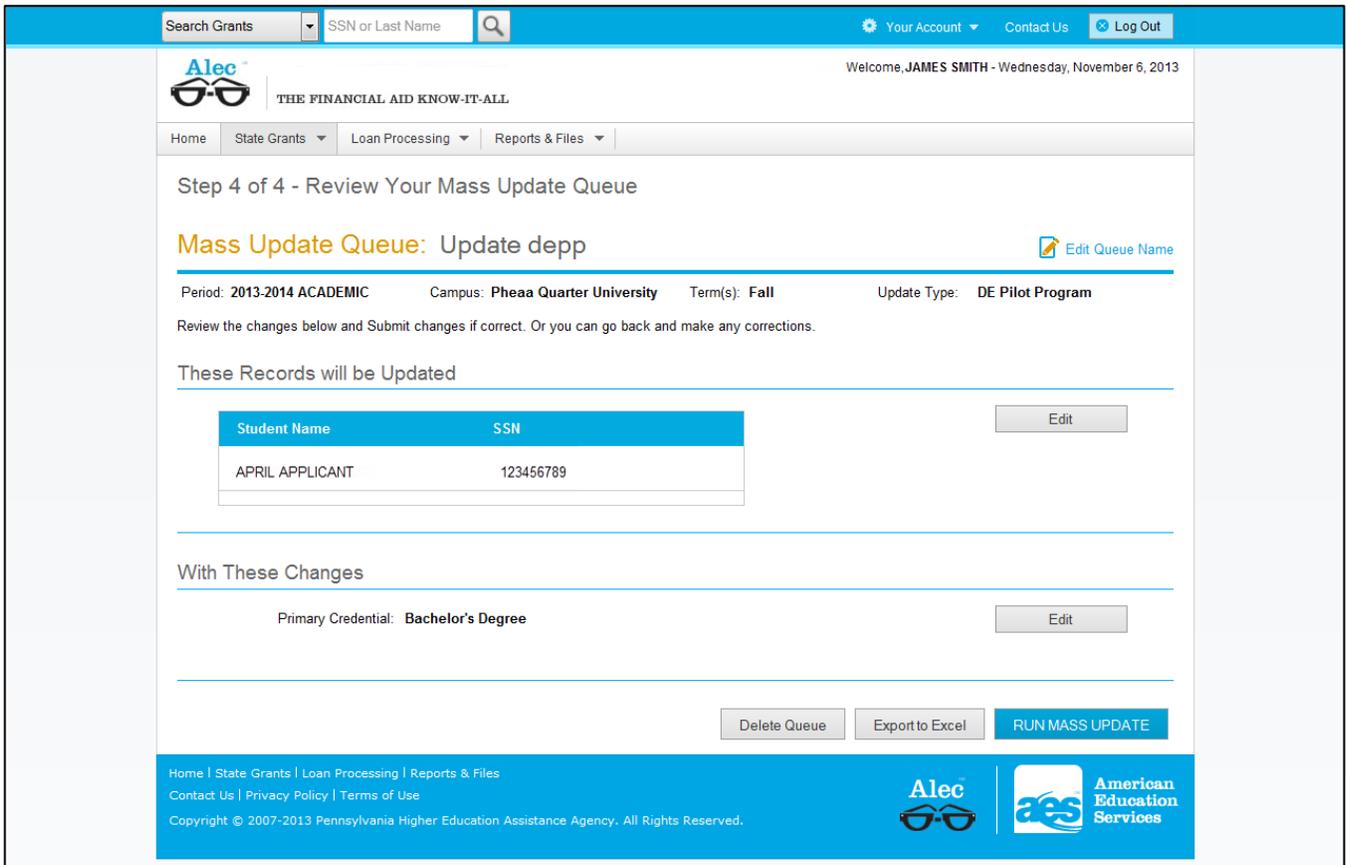


School Portal Distance Education Partner Interface

15. In the **Cumulative GPA** field, enter the student's total grade point average.
16. In the **Cumulative Credits Earned** field, enter the total number of credits earned.
17. In the **Primary Credential Completed** field, click the down arrow and select the credential once the student has completed the program.
18. In the **Term Tuition** field, enter the tuition for the term.
19. In the **Term Fees** field, enter the fees for the term.
20. Click **Previous** to return to step two, or click **Continue**. Click **Clear** to clear the information on the page to begin again.

School Portal Distance Education Partner Interface

➔ The **Step 4 of 4 – Review Your Mass Update Queue** page displays.



Search Grants [SSN or Last Name] [Search] [Your Account] [Contact Us] [Log Out]

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Step 4 of 4 - Review Your Mass Update Queue

Mass Update Queue: Update depp [Edit Queue Name](#)

Period: 2013-2014 ACADEMIC Campus: Pheaa Quarter University Term(s): Fall Update Type: DE Pilot Program

Review the changes below and Submit changes if correct. Or you can go back and make any corrections.

These Records will be Updated

Student Name	SSN	Edit
APRIL APPLICANT	123456789	<input type="button" value="Edit"/>

With These Changes

Primary Credential: Bachelor's Degree

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The **Mass Update Queue** field displays the name of the queue entered on the previous page. To change the name of the queue, click **Edit Queue Name**.

The **Period, Campus, School, Term(s)** and **Update Type** fields display the information that was entered on the previous page.

The **These Records will be Updated** displays a list of SSNs that will be updated.

21. Click **Edit** to return to step 2 to edit the list of SSNs.

The **With these Changes** section displays the updates that will be made.

22. Click **Edit** to return to step 3 to edit the updates that will be made.

23. Click **Delete Queue** to delete the queue.

School Portal Distance Education Partner Interface

NOTE: If the school user clicks **Delete Queue**, the **Delete Queue** dialog box displays, not shown. Click **Yes, Delete Queue** to confirm the deletion.

24. Click **Export to Excel** to export the update criteria to an Excel spreadsheet. See [Appendix: Export Mass Update Reports to Excel](#) for more information.
25. Click **Run Mass Update** to run the update.

School Portal Distance Education Partner Interface

➔ The results page displays when the school user clicks **Run Mass Update** on the previous page.

WARNING: If the school user leaves this page, he or she will not be able to return to view the results.

The screenshot shows the Alec School Portal interface. At the top, there is a search bar for grants and a user account menu. The main content area displays the following information:

- Period: 2013-2014 ACADEMIC
- Campus: Pheaa Quarter University
- Term(s): Fall
- Update Type: DE Pilot Program

Below this information, the heading "Successful Updates" is displayed. A table shows the results of the update:

SSN	Student Name	Details
123456789	APRIL APPLICANT	Record successfully updated.

At the bottom of the table, there are two buttons: "Export to Excel" and "Create Another Mass Update".

The **Period**, **Campus**, **Term(s)** and **Update Type** fields display the information that was entered on the previous page.

Accounts display in one of the following sections depending on the status of the update:

- The **Successful Updates** section displays a list of accounts that have been updated successfully, including the current eligibility which may have changed as a result of the update.
- The **Successful Updates – Pending Review** section displays a list of accounts that have been updated successfully but the eligibility has not be recalculated and is pending a review by PHEAA.
- The **Unsuccessful Updates** section displays a list of accounts that have not been updated successfully. Unsuccessful accounts are saved in the queue for further review until the queue is deleted.

School Portal Distance Education Partner Interface

26. Click **Export to Excel** to export the mass update report to an Excel spreadsheet. See [Appendix: Export Mass Update Reports to Excel](#) for more information.
27. Click **Create Another Mass Update** to create another mass update queue using the instructions in this section.

School Portal Distance Education Partner Interface

Edit Distance Education Mass Update Queue

School users can edit mass update queues from the Distance Education Dashboard when a mass update queue was created but not run.

The screenshot displays the 'Distance Education' dashboard with several sections:

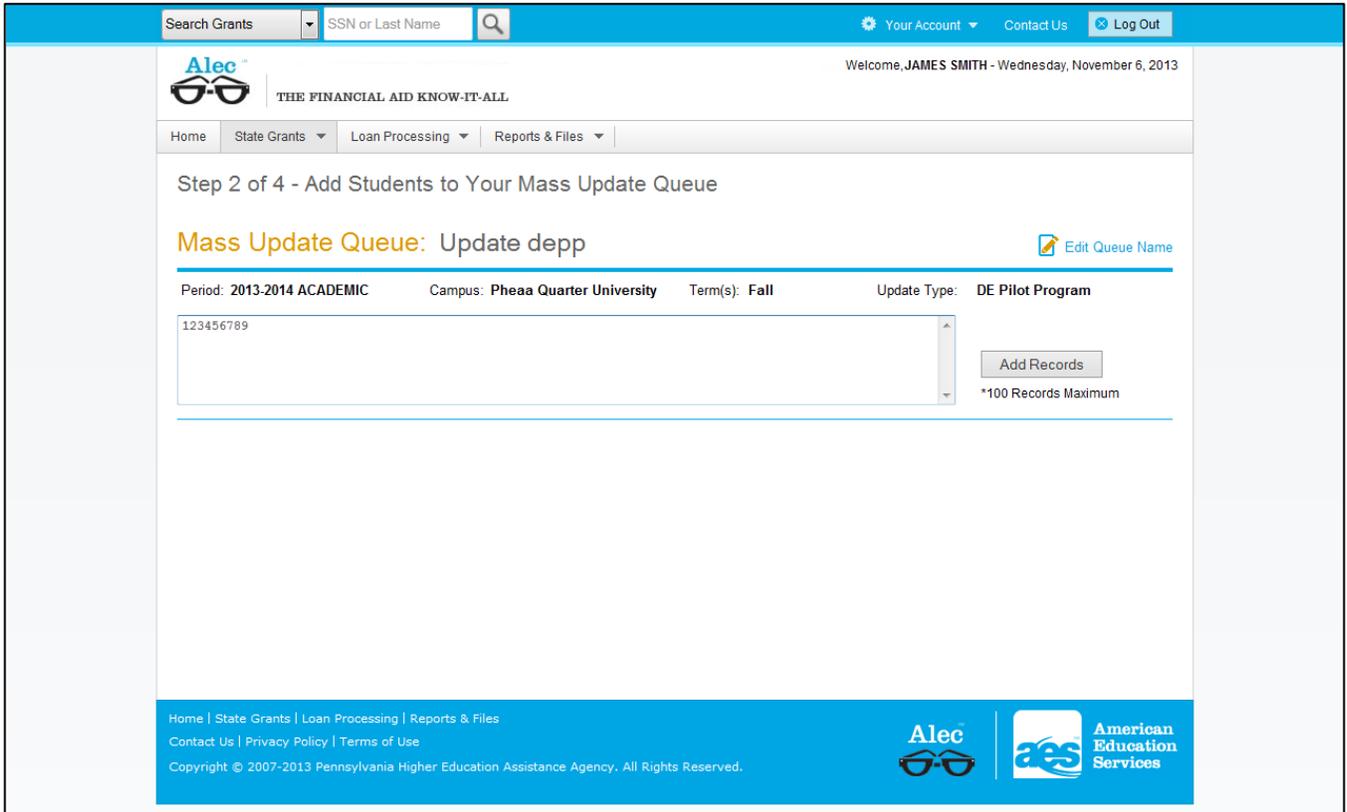
- Process Distance Education Award:** A table showing counts for various statuses across Fall, Winter, Spring, and All semesters.
- Complete Reporting for Distance Education Supplemental Information:** A table showing 'Incomplete Reporting' counts for Fall, Winter, and Spring.
- Review Refunds for Distance Education Awards:** A table showing 'Refunds Needed' and 'Refunds Total' counts for Fall, Winter, Spring, and All.
- Process Distance Education Mass Update:** A table with columns for Queue Name, Records, Date Created, and Actions. A red arrow points to the 'Edit' link for a queue named 'test'.
- View Disbursements:** A table showing disbursement records with columns for Name, No., and Status.
- View Refunds:** A section with a 'View All Refund Groups' link.

At the bottom of the dashboard, there are navigation links (Home, State Grants, Loan Processing, Reports & Files, Contact Us, Privacy Policy, Terms of Use), logos for Atec and American Education Services, and a copyright notice for the Pennsylvania Higher Education Assistance Agency.

1. Click **Edit** to update the mass update queue.

School Portal Distance Education Partner Interface

➔ The **Step 2 of 4 – Add Students to Your Mass Updates Queue** page displays.



The screenshot shows the 'Step 2 of 4 - Add Students to Your Mass Update Queue' page. At the top, there is a search bar for grants with a dropdown menu and a search button. The user is logged in as JAMES SMITH on Wednesday, November 6, 2013. The page title is 'Step 2 of 4 - Add Students to Your Mass Update Queue'. Below the title, the 'Mass Update Queue' is named 'Update depp'. The queue details are: Period: 2013-2014 ACADEMIC, Campus: Pheaa Quarter University, Term(s): Fall, and Update Type: DE Pilot Program. A text input field contains the number '123456789'. To the right of the input field is an 'Add Records' button and a note '*100 Records Maximum'. At the bottom of the page, there is a footer with navigation links, the Alec logo, and the American Education Services logo.

Make changes to the mass update queue using the instructions in the [Create Distance Education Mass Update Queue](#) section.

School Portal Distance Education Partner Interface

Process Distance Education Mass Update Queue

School users can process mass update queues from the Distance Education Dashboard when a mass update queue was created but not run.

The screenshot displays the 'Distance Education' dashboard with several sections:

- Process Distance Education Award:** A table showing counts for various award statuses across Fall, Winter, Spring, and All semesters.
- Complete Reporting for Distance Education Supplemental Information:** A table showing incomplete reporting counts for Fall, Winter, and Spring.
- Review Refunds for Distance Education Awards:** A table showing the number of refunds needed and total refunds.
- Process Distance Education Mass Update:** A table with columns for Queue Name, Records, Date Created, and Actions. A red arrow points to the 'Process' button in the Actions column for the 'test' queue.
- View Disbursements:** A table showing disbursement records with columns for Name, No., and Status.
- View Refunds:** A section with a 'View All Refund Groups' link.

At the bottom of the dashboard, there are navigation links (Home, State Grants, Loan Processing, Reports & Files, Contact Us, Privacy Policy, Terms of Use), logos for Atec and American Education Services, and a copyright notice for the Pennsylvania Higher Education Assistance Agency.

1. Click **Process** to process the mass update queue.

School Portal Distance Education Partner Interface

➔ The **Step 3 of 4 – Choose the Updates for Your Queue** page displays.

Search Grants [SSN or Last Name] [Search] [Your Account] [Contact Us] [Log Out]

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Step 3 of 4 - Choose the Updates for Your Queue

Mass Update Queue: Update depp [Edit Queue Name]

Period: 2013-2014 ACADEMIC Campus: Pheaa Quarter University Term(s): Fall Update Type: DE Pilot Program

Would you like to nominate these students for the Distance Education Pilot Program or enter Institutional Reporting Requirements information?

Students Participating in Distance Ed Pilot Program

Select if you would like to nominate these students for the Pilot Program in this mass update.

Nominate for Distance Education Award:

CIP Code: [] . [] [Search]

< Previous Clear Continue >

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Alec™ **aes** American Education Services

Process, or run, the mass update queue using the instructions in the [Create Distance Education Mass Update Queue](#) section.

Delete Distance Education Mass Update Queue

School users can delete mass update queues from the State Grants Dashboard when a mass update queue was created but not run.

The screenshot displays the 'Distance Education' section of the State Grants Dashboard. It includes several data tables and navigation options. A red arrow points to the 'Delete' link in the 'Process Distance Education Mass Update' table.

Status	Fall	Winter	Spring	All
Not Nominated (DE <50%)	6	7	7	
Nominated (Pending Eligibility)	6	6	6	6
Awarded - Needs Certification	10	11	0	12
Awarded - Certified	0	0	0	0
Rejects - Distance Education Funds Depleted	0	0	0	
Rejects - All Other Reject Types	1	1	0	
Nominated Students Total	36	34	34	36

Name	No.	Status
Disbrsmnt - 12/08/2014	28	Processed
Disbrsmnt - 12/05/2014	9	Processed
Disbrsmnt - 12/04/2014	9	Processed

Status - All Participants	Fall	Winter	Spring
Incomplete Reporting	37	37	37

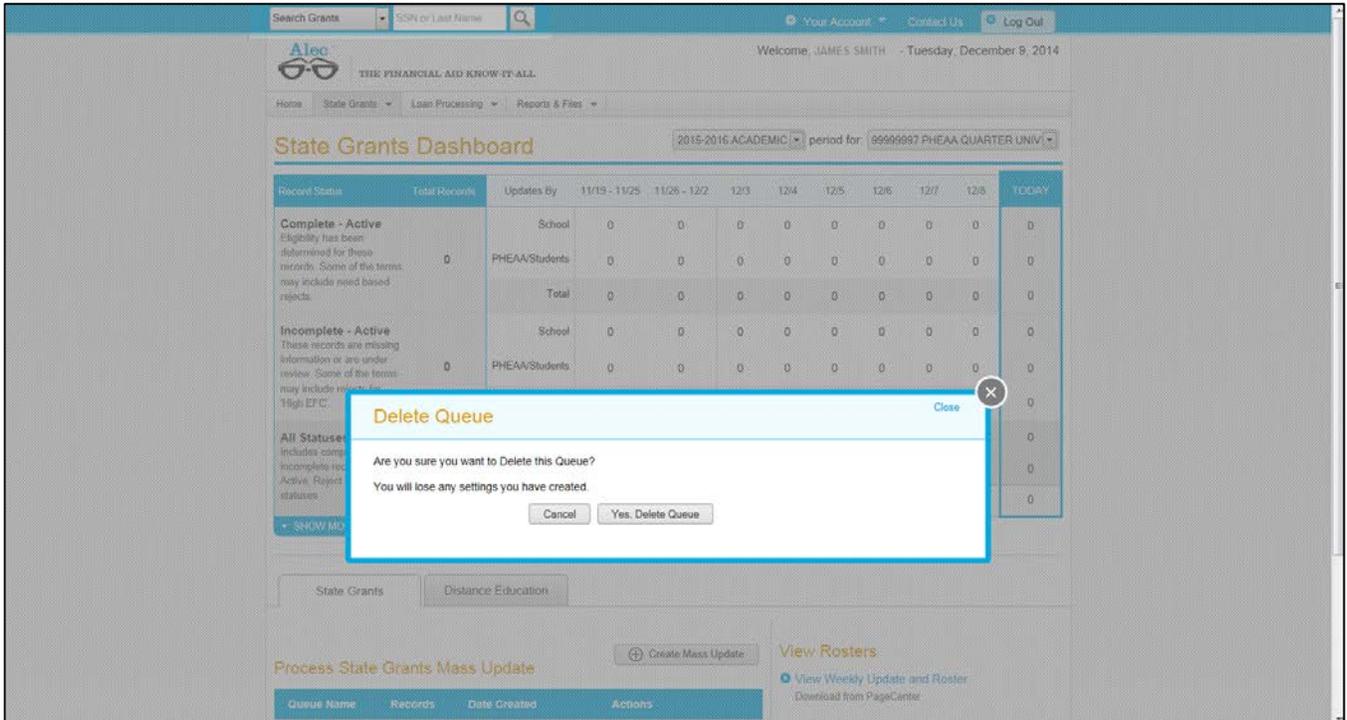
Status	Fall	Winter	Spring	All
Refunds Needed	0	0	0	0
Refunds Total	0	0	0	0

Queue Name	Records	Date Created	Actions
test	1	12/05/2014 03:24 PM	Edit Process Delete

1. Click **Delete** to delete the mass update queue.

School Portal Distance Education Partner Interface

➡ The **Delete Queue** dialog box displays.

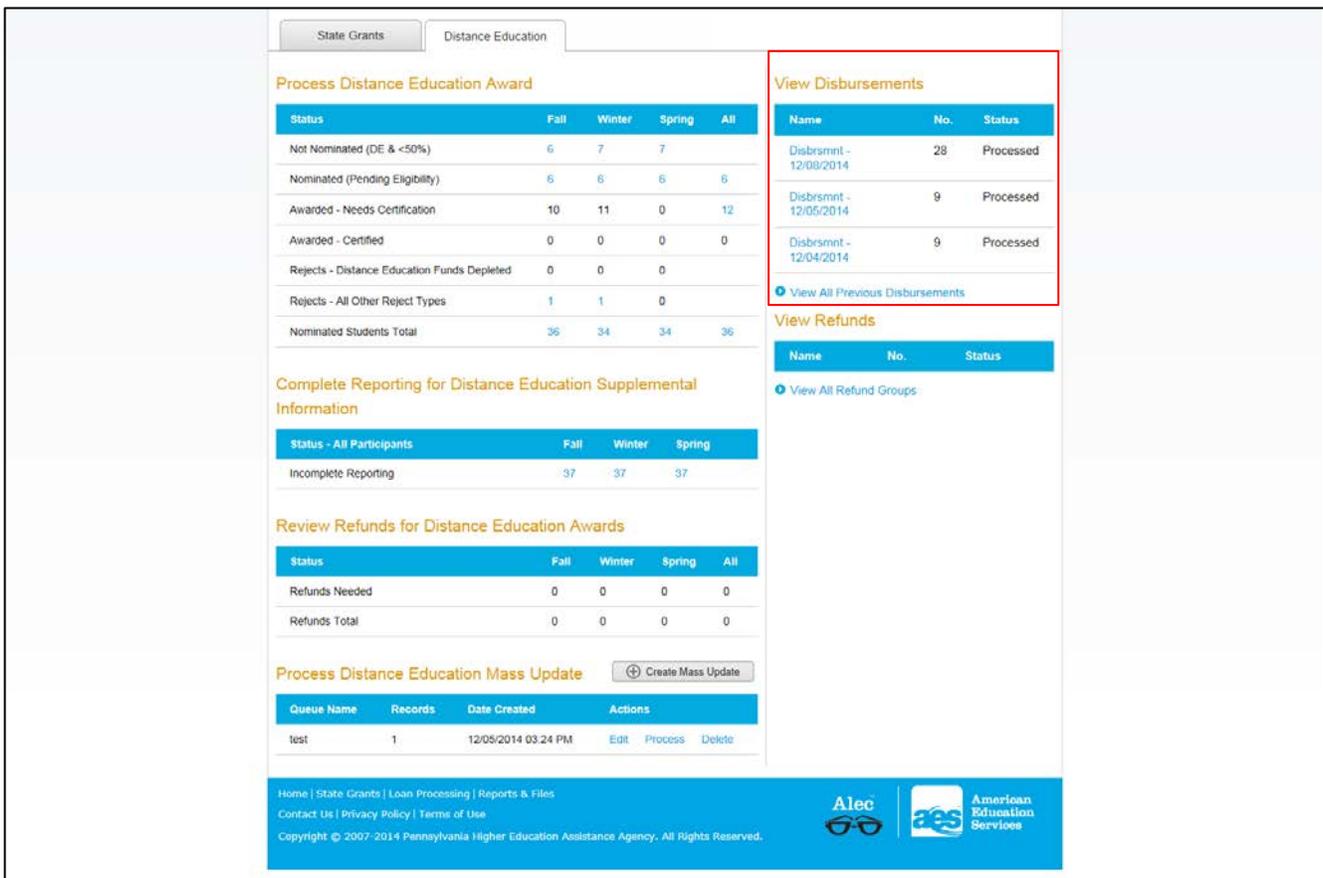


2. Click **Yes, Delete Queue** to delete the mass update queue or click **Cancel** to close the dialog box without canceling the mass update queue.

School Portal Distance Education Partner Interface

View Disbursements

The **View Disbursements** section displays up to four of the most recent disbursement rosters for the selected school branch and a link to view all previous disbursement rosters. If **All Schools** is selected, only the link to view all previous disbursement rosters displays. This displays the disbursement rosters for all of the school’s branches.



The screenshot shows the 'Distance Education' tab selected. The 'View Disbursements' section is highlighted with a red box and contains the following table:

Name	No.	Status
Disbrsmnt - 12/00/2014	28	Processed
Disbrsmnt - 12/05/2014	9	Processed
Disbrsmnt - 12/04/2014	9	Processed

Below the table is a link: [View All Previous Disbursements](#)

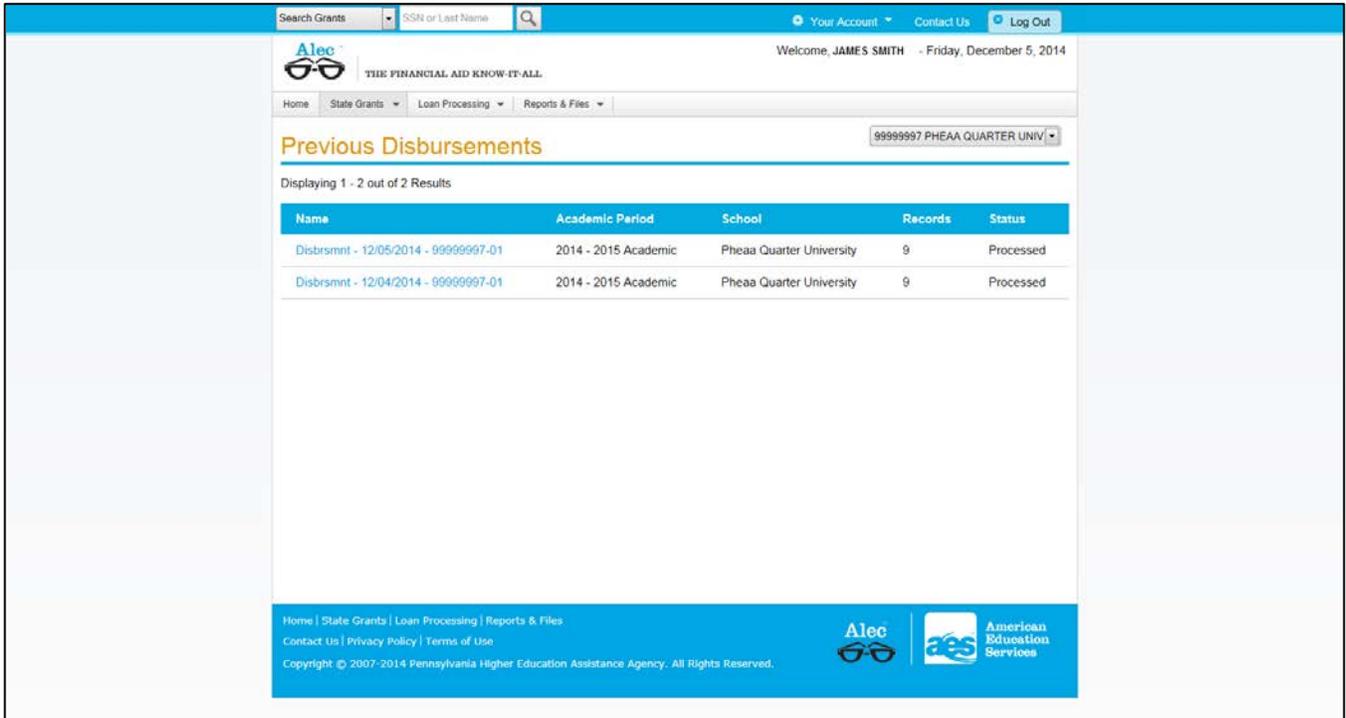
Other sections visible in the screenshot include:

- Process Distance Education Award**: A table with columns for Status, Fall, Winter, Spring, and All. Rows include Not Nominated, Nominated, Awarded, and Rejects.
- Complete Reporting for Distance Education Supplemental Information**: A table with columns for Status, Fall, Winter, and Spring. Row: Incomplete Reporting.
- Review Refunds for Distance Education Awards**: A table with columns for Status, Fall, Winter, Spring, and All. Rows: Refunds Needed, Refunds Total.
- Process Distance Education Mass Update**: A table with columns for Queue Name, Records, Date Created, and Actions. Row: test.

1. Click one of the previous disbursement rosters, if available, or click **View All Previous Disbursements** to view a list of all disbursement rosters.

School Portal Distance Education Partner Interface

➔ The **Previous Disbursements** page displays.



The screenshot shows the PHEAA School Portal Distance Education Partner Interface. The page title is "Previous Disbursements" and it displays 1 - 2 out of 2 results. The results are shown in a table with the following columns: Name, Academic Period, School, Records, and Status.

Name	Academic Period	School	Records	Status
Disbrsmnt - 12/05/2014 - 99999997-01	2014 - 2015 Academic	Pheaa Quarter University	9	Processed
Disbrsmnt - 12/04/2014 - 99999997-01	2014 - 2015 Academic	Pheaa Quarter University	9	Processed

The **Name** field displays the name of the disbursement roster.

The **Academic Period** field displays the academic period for the disbursement roster.

The **School** field displays the name of the school on the disbursement roster.

The **Records** field displays the number of recipients on the disbursement roster.

The **Status** field displays the status of the disbursement roster.

2. Click the link in the **Name** field to view the disbursement roster.



School Portal Distance Education Partner Interface

➡ The **SGDEPP Disbursement Roster** displays.

NOTE: The PDF version of the disbursement roster has slight formatting differences from the PageCenter version. Refer to the SGDEPP Program Guidelines on the PHEAA Web site for more information.

STUDENT IDENTIFICATION ELIGIBILITY INFORMATION		FALL TERM	WINTER TERM	SPRING TERM	TOTAL GRANT	DUE STUDENT	PHEAA REFUND OUTSTANDING	REQUESTS RECEIVED
99999997-01 ATTN: FINANCIAL AID ADMINISTRATOR 010997 PHEAA QUARTER UNIVERSITY		PENNSYLVANIA HIGHER EDUCATION ASSISTANCE AGENCY 2014 - 2015 SGDEPP DISBURSEMENT ROSTER 12/05/2014			Page: 1 WINTER DISBURSEMENT (QUARTER)			
123-45-6789		\$0	STGRT	STGRT	\$0	\$0	NONE	NONE
STUDENT, APRIL								
PHEAA COLLECTABLE -								
PRIOR GRANTS - 1.75								LAST AWARD DIFFERENT SCHOOL
REMEDIAL EXCEPTION - 0.0								
123-45-6789		NOCRT	NOCRT	\$1,138	\$1,138	\$0	NONE	NONE
*STUDENT, ABBY								
PHEAA COLLECTABLE -								
PRIOR GRANTS - 1.0								
REMEDIAL EXCEPTION - 0.0								
123-45-6789		I	NOCRT	\$1,138	\$1,138	\$0	NONE	NONE
*STUDENT, AVA								
PHEAA COLLECTABLE -								
PRIOR GRANTS - 1.0								LAST AWARD DIFFERENT SCHOOL
REMEDIAL EXCEPTION - 0.0								

View Refunds

The **View Refunds** section displays up to four of the most recent refund groups for the selected school branch and a link to view all refund groups. If **All Schools** is selected, only the link to view all refund groups displays. This displays the refund groups for all of the school's branches.

State Grants
Distance Education
Ready to Succeed

Process Distance Education Award

Status	Fall	Winter	Spring	All
Not Nominated (DE & <50%)	6	6	7	
Nominated (Pending Eligibility)	0	1	0	1
Awarded - Needs Certification	10	14	14	14
Awarded - Certified	0	1	1	1
Rejects - Distance Education Funds Depleted	0	0	0	
Rejects - All Other Reject Types	3	3	1	
Nominated Students Total	37	36	35	37

Complete Reporting for Distance Education Supplemental Information

Status - All Participants	Fall	Winter	Spring
Incomplete Reporting	37	37	37

Review Refunds for Distance Education Awards

Status	Fall	Winter	Spring	All
Refunds Needed	1	0	0	1
Refunds Total	2	0	0	2

Process Distance Education Mass Update

Queue Name	Records	Date Created	Actions
No Mass Updates have been created.			

View Disbursements

Name	No.	Status
Disbrsmnt - 04/13/2015	23	Processed
Disbrsmnt - 04/13/2015	23	Processed
Disbrsmnt - 02/17/2015	33	Processed
Disbrsmnt - 02/17/2015	35	Processed

[View All Previous Disbursements](#)

View Refunds

Name	No.	Status
Refunds - Received	1	Received

[View All Refund Groups](#)

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1. Click one of the previous refund groups, if available, or click **View All Refund Groups** to view a list of all refund groups.

School Portal Distance Education Partner Interface

➔ The **Refund Groups List** displays.

The screenshot shows the PHEAA School Portal interface. At the top, there is a search bar for grants and a user account section for James Smith. The main content area displays the 'Refunds for Distance Education Award' page for the user '99999997 PHEAA QUARTER UNIV'. A table shows one result for a refund group.

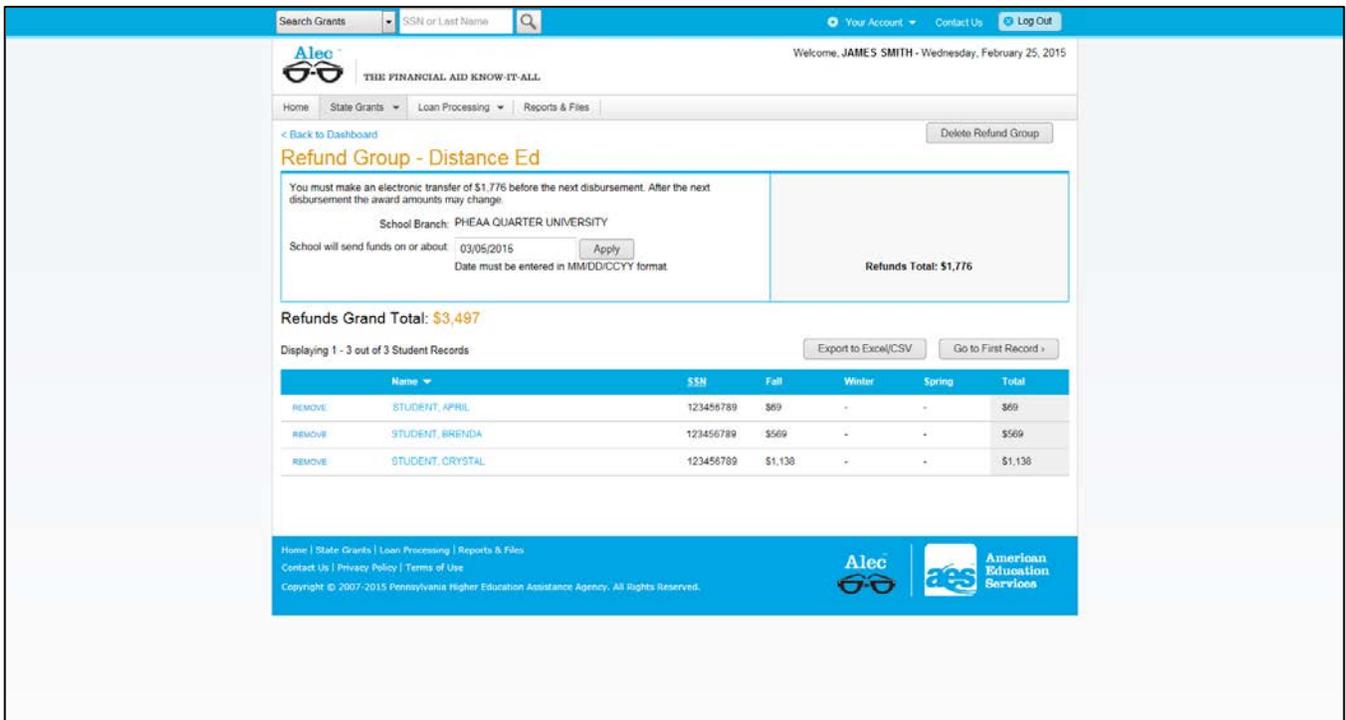
Name	Academic Period	School	Records	Status
Refunds - Received - 99999997-01	2014 - 2015 Academic	Pheaa Quarter University	1	Received

There are four refund group statuses: received, changed, under review and processed. While there may be multiple refund groups for the same refund group status, only one will be active.

2. Click the link in the refund group **Name** field. See the following sections for more information about the refund groups:
 - [Refunds – Received](#)
 - [Refunds – Changed](#)
 - [Refunds – Under Review](#)
 - [Refunds – Processed](#)

Refunds – Received

The **Refunds - Received** status indicates that a refund group has been created and no changes have been made to the group since the last disbursement.



The screenshot shows the Alec School Portal interface. At the top, there is a search bar for grants by SSN or last name, and user account information for JAMES SMITH. The main content area is titled 'Refund Group - Distance Ed' and includes a 'Delete Refund Group' button. A message states: 'You must make an electronic transfer of \$1,776 before the next disbursement. After the next disbursement the award amounts may change.' Below this, the school branch is 'PHEAA QUARTER UNIVERSITY' and the school will send funds on or about '03/05/2015'. A 'Refunds Total: \$1,776' field is displayed. A 'Refunds Grand Total: \$3,497' field is also shown. A table displays 3 student records with columns for Name, SSN, Fall, Winter, Spring, and Total. The table data is as follows:

Name	SSN	Fall	Winter	Spring	Total
REMOVE STUDENT, APRIL	123456789	\$69	-	-	\$69
REMOVE STUDENT, BRENDA	123456789	\$569	-	-	\$569
REMOVE STUDENT, CRYSTAL	123456789	\$1,138	-	-	\$1,138

The **Refunds Total** field displays the total refund due for the current refund group.

The **Refunds Grand Total** field displays the grand total of all refunds.

1. To delete the refund group, click **Delete Refund Group**.

WARNING: There is no confirmation. The refund group is deleted immediately.

2. To change the date the school will send the refund, change the date in the **School will send funds on or about** field and click **Apply**.
3. To remove a student record from the refund, click **REMOVE**.
4. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

School Portal Distance Education Partner Interface

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

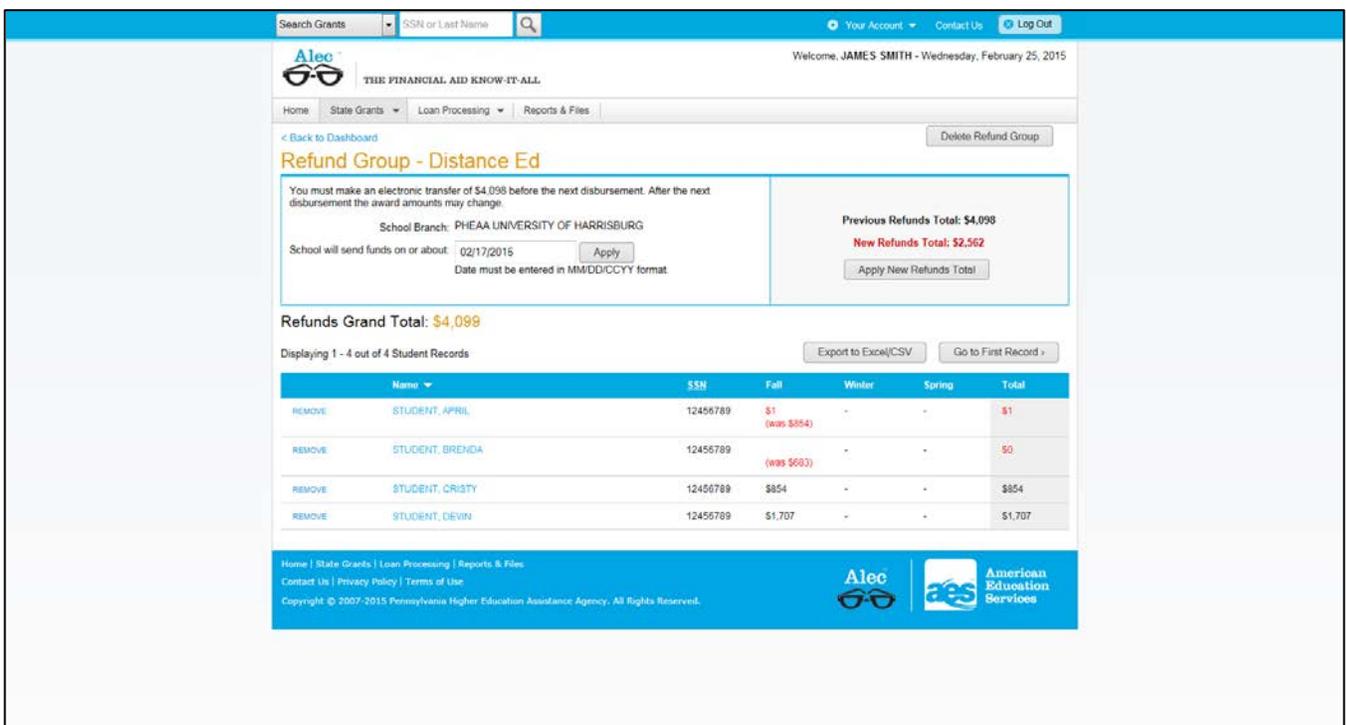
5. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the refund group.
6. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.

School Portal Distance Education Partner Interface

Refunds – Changed

The **Refunds – Changed** status indicates that the refund amount for at least one student listed on an unprocessed refund group has been altered due to changes in the student’s enrollment and eligibility.

NOTE: Refunds are calculated when disbursement rosters are generated. When a change to a student’s enrollment and eligibility affects the amount of a student’s refund, the refund is recalculated the next time a disbursement roster is generated and displays in the **Refunds – Changed** status.



The **Previous Refunds Total** field displays the previous total refund due for the current refund group.

The **New Refunds Total** field displays the new total refund due for the current refund group.

The **Refunds Grand Total** field displays the grand total of all refunds.

1. To delete the refund group, click **Delete Refund Group**.

WARNING: There is no confirmation. The refund group is deleted immediately.

2. To change the date the school will send the refund, change the date in the **School will send funds on or about** field and click **Apply**.

School Portal Distance Education Partner Interface

3. Click **Apply New Refunds Total** to update the new refunds totals.
4. To remove a student record from the refund, click **REMOVE**.
5. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

6. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the refund group.
7. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.

Refunds – Under Review

The **Refunds – Under Review** status indicates that funds have been received by PHEAA Financial Management and the funds received amount does not equal the Refunds Total listed on the active invoice.

NOTE: This does not indicate that funds have been posted to the student’s account.

The screenshot shows the 'Refund Group - Distance Ed' page. A summary box contains the following information:

- Refunds Total: \$1,207
- Amount Received: \$1,200
- Difference: \$7

Below the summary box, the 'Refunds Grand Total' is \$5,729. A table displays student records for the refund group:

Name	SSH	Fall	Winter	Spring	Total
STUDENT, APRIL	123456789	\$1,207	-	-	\$1,207

The **Refunds Total** field displays the total value of the refund group.

The **Amount Received** field displays the amount of the refund payment.

The **Difference** field displays the difference between the total value of the refund group and the refund payment received.

The **Refunds Grand Total** field displays the grand total of all refunds.

1. To delete the refund group, click **Delete Refund Group**.

WARNING: There is no confirmation. The refund group is deleted immediately.

School Portal Distance Education Partner Interface

2. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Distance Education Information on the Student Record](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

3. Click **Export to Excel/CSV** to export the student list. See [Appendix: Export Mass Update Reports to Excel](#) for more information about exporting the refund group.
4. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Distance Education Information on the Student Record](#) for more information.



School Portal Distance Education Partner Interface

Refunds – Processed

The **Refunds - Processed** status indicates that funds have been received for the refund group, posted for the appropriate student(s) listed on the invoice(s) and added back to the Distance Education Pilot Program allocation.

NOTE: Processed refunds display on a downloadable PDF.

99999999-99	PENNSYLVANIA HIGHER EDUCATION ASSISTANCE AGENCY	Page: 1			
ATTN: FINANCIAL AID ADMINISTRATOR	2014 - 2015 SGDEPP REFUND GROUP				
000000 PHEAA UNIVERSITY OF HARRISBURG	08/27/2015	REFUNDS TOTAL: \$31,830			
STUDENT NAME	SSN	FALL TERM	WINTER TERM	SPRING TERM	TOTAL REFUND
STUDENT, APRIL	123-45-6789	\$0	\$0	\$374	\$374

Access Disbursement Certification

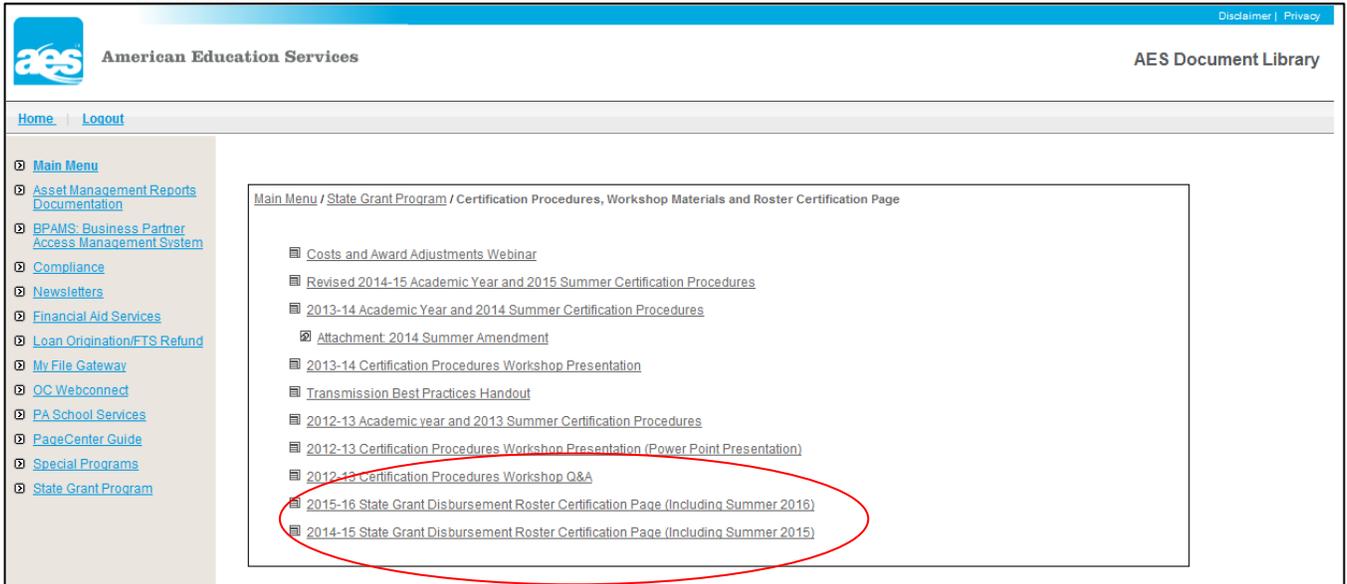
School users can access the **Disbursement Certification** form from the Home page or from the **State Grants** drop-down list.

The screenshot displays the PHEAA School Portal interface. At the top, there is a search bar for grants and a navigation menu with options like 'Your Account', 'Contact Us', and 'Logout'. The main content area is divided into several sections: 'State Grants', 'Loan Processing', 'Reports & Files', 'Messages', 'Alerts (Notifications)', 'Order Materials', 'Training & Publications', and 'Default Prevention'. In the 'State Grants' section, the 'State Grant Disbursement Certification' link is circled in red. Other links in this section include 'View State Grants Dashboard', 'Create Mass Update Queue', 'View Weekly Updates and Roster', 'View My Exports', 'Access State Grant & Special Programs', 'State Grant Education Costs', and 'Request Primary School Change'. The 'Loan Processing' section includes 'Real-time Processing with AES Loans' and 'Direct Access to the AES System'. The 'Reports & Files' section includes 'Standard Reports' and 'Send & Receive Files'. The right-hand side contains 'Messages' (no messages), 'Alerts (Notifications)' (no alerts), 'Order Materials' (Program Materials), 'Training & Publications' (Training Event Schedule, Document Library, Loan Notes, Common Manual), and 'Default Prevention' (You Can Deal With It, YCDWI Downloads, EDUCATIONPLANNER).

1. Click **State Grant Disbursement Certification** on the **Home** page or the **State Grant** home drop-down list.

School Portal Distance Education Partner Interface

➔ The **AES Document Library** opens to the **Certification Procedures, Workshop Materials and Roster Certification** page.



The screenshot shows the AES Document Library interface. The breadcrumb trail is: [Main Menu](#) / [State Grant Program](#) / [Certification Procedures, Workshop Materials and Roster Certification Page](#). The list of documents includes:

- Costs and Award Adjustments Webinar
- Revised 2014-15 Academic Year and 2015 Summer Certification Procedures
- 2013-14 Academic Year and 2014 Summer Certification Procedures
 - Attachment: 2014 Summer Amendment
- 2013-14 Certification Procedures Workshop Presentation
- Transmission Best Practices Handout
- 2012-13 Academic year and 2013 Summer Certification Procedures
- 2012-13 Certification Procedures Workshop Presentation (Power Point Presentation)
- 2012-13 Certification Procedures Workshop Q&A
- 2015-16 State Grant Disbursement Roster Certification Page (Including Summer 2016)
- 2014-15 State Grant Disbursement Roster Certification Page (Including Summer 2015)

2. Click **XXXX-XX State Grant Disbursement Roster Certification Page**. **XXXX-XX** indicates the academic year.

School Portal Distance Education Partner Interface

➔ In this example, the 2015-2016 **DISBURSEMENT CERTIFICATION** form displays.

DISBURSEMENT CERTIFICATION

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:

4. Date of Roster:

CERTIFICATION STATEMENT

I hereby certify, as an authorized representative of the educational institution identified above, that this roster has been processed in accordance with PHEAA instructions for processing 2015-16 disbursement or reconciliation rosters and that funds were received by electronic transfer. I further certify that all school changes were submitted in accordance with PHEAA's qualifying procedures.

I also certify that my institution continues to meet the institutional eligibility requirements for participation in the program for which funds have been accepted.

I understand that one certified copy of this roster certification page must be returned to PHEAA by the deadline in accordance with PHEAA instructions.

I further understand that retention of any program refunds due PHEAA for the 2015-16 academic year or summer period after the reconciliation deadline provided in PHEAA instructions may result in: 1) all subsequent program disbursements being withheld; and 2) an interest charge being assessed against the outstanding balance due until the refund is received by PHEAA.

5. Name/Title 6. Date

7. E-Mail Address of School Official



School Portal Distance Education Partner Interface

3. In the **OE Code** field, enter the six- or eight-digit school ID assigned by the Department of Education.
4. In the **School Information** fields, enter the name, address and phone number of the school's financial aid office.
5. Click the down arrow in the **Certification Period** field and select **Academic Year Reconciliation SGDEPP** or **Summer Reconciliation SGDEPP** from the drop-down list.
6. Click the down arrows in the **Date of Roster** field and select the month, day and year of the disbursement roster.
7. In the **Name/Title** field, enter the name and title of the financial aid administrator or other school official who completed the **Disbursement Certification** form.
8. Click the down arrows in the **Date** field and select the month, day and year the **Disbursement Certification** form was completed.
9. In the **E-Mail Address of School Official** field, enter the email address of the financial aid administrator or other school official who completed the **Disbursement Certification** form.
10. Click **Submit** to submit the form, or click **Reset** to reset the form and start again.

NOTE: Entries are processed nightly Monday through Friday. School users can view the school activity on the **STATE GRANT AND SPECIAL PROGRAMS ACTIVITY** screen using transaction FC5S.

IMPORTANT! School users should print this page *prior* to submission and keep a copy for their records.

Appendix: Export Mass Update Reports to Excel

Mass update reports can be exported to Excel. The steps are the same whether they are for update or cancel queues; however, they contain different content depending on whether they are exported before the update or after. See [Before Mass Update](#) and [After Mass Update](#) for more information.

Before Mass Update

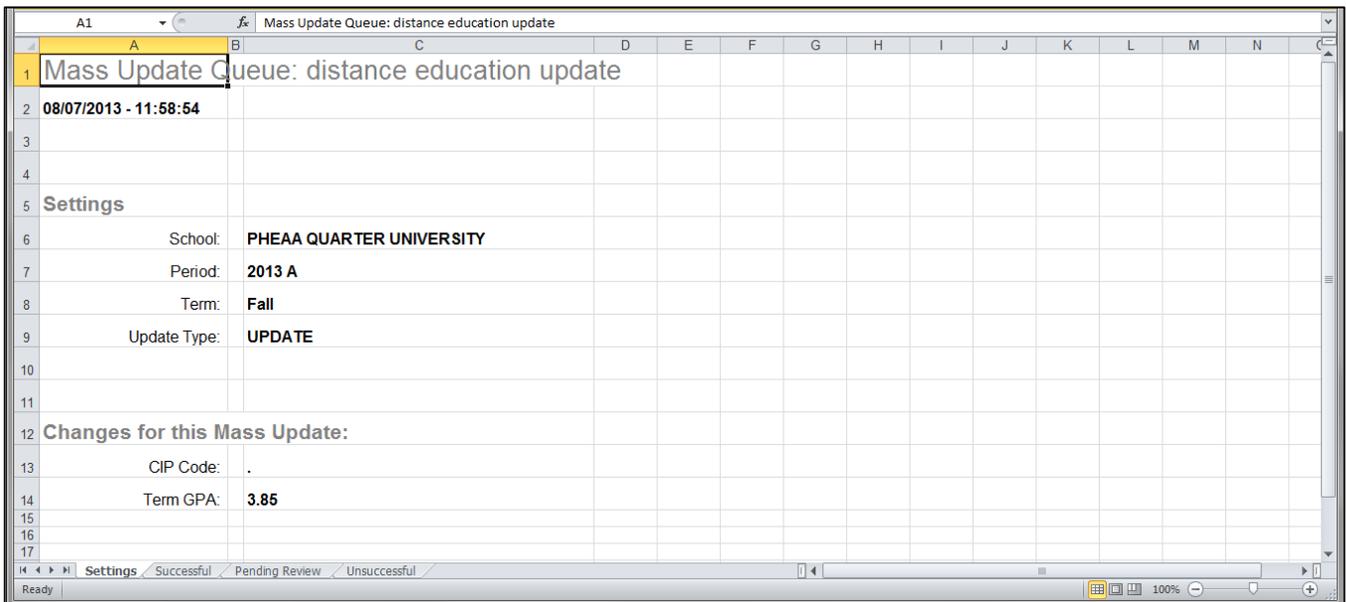
If the export is done before the mass update is run, only the criteria for the update are exported to the Excel spreadsheet –not the results. The one-page spreadsheet includes the name of the queue, the current date and time, the settings selected, the changes that will be made, and a list of the records to be updated.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Mass Update Queue: distance education update											
2	07/14/2015 - 12:50:16											
3												
4												
5	Settings											
6	School:	PHEAA QUARTER UNIVERSITY										
7	Period:	2013 A										
8	Term:	Fall										
9	Update Type:	UPDATE										
10												
11												
12	Changes for this Mass Update:											
13	CIP Code	.										
14	Term GPA	3.85										
15												
16	Records to be Updated											
17	SSN	Student Name										
18	123456789	APRIL APPLICANT										
19												
20												
21												
22												
23												
24												
25												

School Portal Distance Education Partner Interface

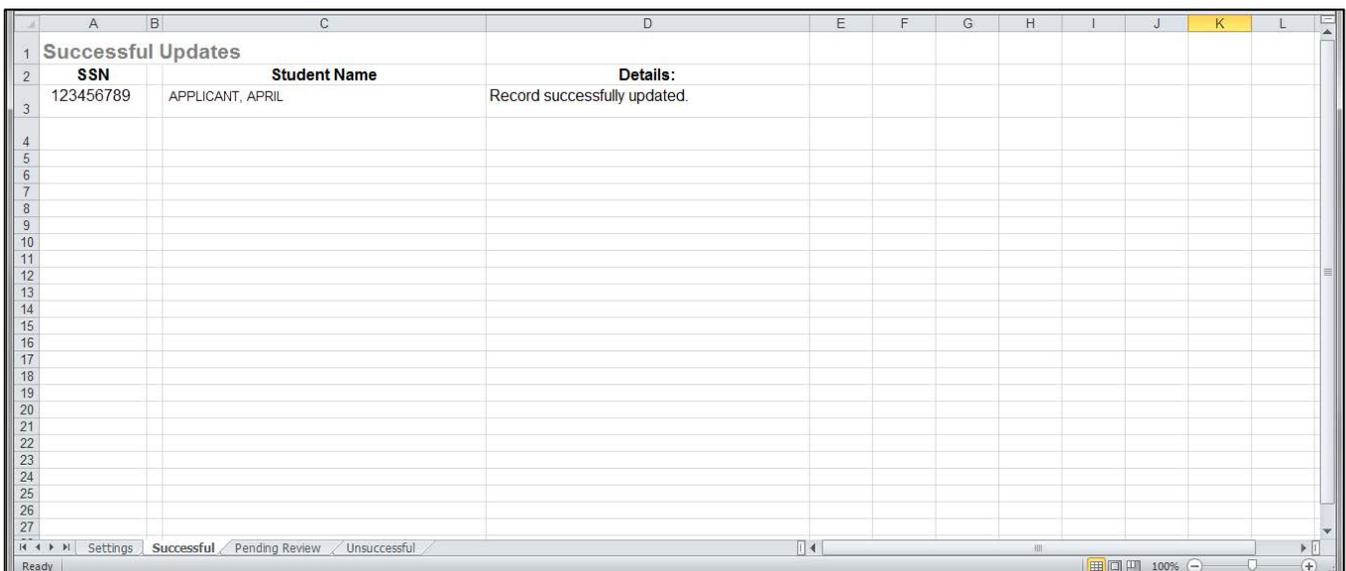
After Mass Update

If the export is done after the mass update is run, both the criteria and the results of the update are exported to an Excel spreadsheet. The first worksheet of the spreadsheet includes the name of the queue, the date and time exported, the settings selected, and the changes that were made. The remaining three worksheets display a list of the students by the following update statuses: Successful, Pending Review, and Unsuccessful.



Row	Content
1	Mass Update Queue: distance education update
2	08/07/2013 - 11:58:54
5	Settings
6	School: PHEAA QUARTER UNIVERSITY
7	Period: 2013 A
8	Term: Fall
9	Update Type: UPDATE
12	Changes for this Mass Update:
13	CIP Code: .
14	Term GPA: 3.85

The example below shows the results for a successful mass update.



Row	SSN	Student Name	Details:
3	123456789	APPLICANT, APRIL	Record successfully updated.

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 aid services, serving millions of students and thousands of schools through its loan guaranty, loan servicing, grant administration, outreach, and other student aid programs.

PHEAA's earnings are used to support its public service mission and to pay its operating costs, including the administration of the Pennsylvania State Grant and other state-funded student aid programs. PHEAA continues to devote its energy, resources and imagination to developing innovative ways to ease the financial burden of higher education for students, families, schools, and taxpayers.

PHEAA conducts its student loan servicing activities nationally as FedLoan Servicing and American Education Services (AES). For more information, visit PHEAA.org.

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