

PHEAA TRAINING

Partner Interface Overview Part 1 - Introductory

Pennsylvania State Grant Program

Purpose of this Webinar

- Deliver an overview of the web interface for State Grant-eligible postsecondary schools
- Explain:
 - ★ Basic Structure of Student Record
 - ★ Submitting a Change on Single Record
 - ★ Submitting a Mass Update Queue
- Provide awareness of self-service training opportunities
- Request feedback

What is Partner Interface?

A web-based tool for use by postsecondary schools to report and/or verify key components used in evaluating eligibility for the Pennsylvania State Grant Program.

- Will replace 'green screen' transactions such as FG0B, FG5Y, FG11C, etc.
 - ★ Date to be determined

How Do I Navigate the Interface?

- Partner Interface functions exist as part of the school portal, Alec

The screenshot displays the Alec web interface. At the top, there is a search bar labeled 'SSN or Last Name' with a 'Search' button. To the right, there are links for 'Your Account', 'Contact Us', and 'Logout'. Below the search bar, the Alec logo is visible, along with the tagline 'THE FINANCIAL AID KNOW-IT-ALL'. The user is logged in as 'Welcome, PHEAA' on 'Monday, December 30, 2013'. A navigation menu includes 'Home', 'State Grants', 'Loan Processing', and 'Reports & Files'. The 'State Grants' section is expanded, showing a list of links: 'View State Grants Dashboard', 'Create Mass Update Queue', 'View Weekly Update and Roster', 'State Grant Disbursement Certification', 'View My Exports', 'Access State Grant & Special Programs', 'State Grant Education Costs', and 'Request Primary School Change'. A 'Messages' section indicates 'There are currently no messages'. An 'Alerts (Notifications)' section shows 'You have no alerts.' and a 'View My Exports' link. An 'Order Materials' section provides links for 'Program Materials' and 'Order loan processing forms, brochures & guides for'.

- Visit www.PHEAA.org/training for navigational tutorials
 - ★ No Audio
 - ★ Zoom Using Web Browser

Basic Structure – Student Record

- Demographic Information and Record Status Summary
- Special Messages
- Tabbed Data
- Eligibility History Button
- Update Button
- Special Request Button

Basic Structure – Student Record

Demographic Information and Record Status Summary

[Back to Student Listing](#)

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

Student Record: Ababuo C Student

Prior Name(s):

[View Eligibility for Student](#)

SSN: XXX-XX-XXXX

ACCT#: XX XXXX XXXX

Award Counter (Grand Total): 0

[Update Record](#)

[Special Request](#)

2014-2015 ACADEMIC

Record Status:

Incomplete

Last Update:

10/31/2013

School Status:

Primary

Dependency Status:

Dependent

Last User:

FGXGK

Received Date:

01/01/2014

[Award Information](#)

[School Notes](#)

[Activity Log](#)

[Application Info](#)

Student Information

Address: 1200 North 7th Street
Harrisburg, PA 17102

Phone: (717) 555-1212

Email: student@pheaa.org

H.S. Graduation: 2005

Basic Structure – Student Record

Special Messages

- *Cheat Sheet*, page 2 – full list of possible messages

2012-2013 ACADEMIC ▾

Record Status: **Incomplete** Last Update: **01/18/2013** School Status: **Primary** ⓘ

Dependency Status: **Dependent** Last User: Received Date: **01/01/2012**

▼ Under Review For
Interest and Dividend Review

Award Information Comment History Activity Log Application Info

Basic Structure – Tabbed Info

- Award Information
- School Notes
- Activity Log
- Application Info

[Back to Student Listing](#) State Grant Information for: 99999999-01 Pheaa University Of Harrisburg

Student Record: Ababuo C Student

Prior Name(s):

[View Eligibility for Student](#)

SSN: XXX-XX-XXXX

ACCT#: XX XXXX XXXX

Award Counter (Grand Total): 0

[Update Record](#)

[Special Request](#)

2014-2015 ACADEMIC

Record Status: **Incomplete**

Last Update: 10/31/2013

School Status: **Primary**

Dependency Status: **Dependent**

Last User: FGXGK

Received Date: 01/01/2014

[Award Information](#)

[School Notes](#)

[Activity Log](#)

Application Info

Student Information

Address: 1200 North 7th Street
Harrisburg, PA 17102

Phone: (717) 555-1212

Email: student@pheaa.org

H.S. Graduation: 2005

Grant Information

	Fall	Winter	Spring	Academic Year Total
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[Award Information](#)

[School Notes](#)

[Activity Log](#)

Application Info

Student Information

Housing Status:	Dormitory	Dormitory	
Enrollment Status:	Full Time Student	Full Time Student	
Award/Reject:			
Alternate Award (AA)	N/A	N/A	

Student Record - Award Information Tab



Grant Information

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	99999999-01 Pheaa University Of Harrisburg	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:	10/18/2013		12/16/2013	
Housing Status:	Dormitory		Dormitory	
Enrollment Status:	Full Time Student	Full Time Student	Full Time Student	
Award/Reject:	Grant Cancelled		\$1,330	\$1,330
Alternate Award (AA)	\$0	N/A	\$665	\$665
Enrollment Status for AA:	Part-Time	Part-Time	Part-Time	
Remedial Exception:				0.0
Award Counters:	0	0	0.34	0.34
Award Type:	Cancellation		Processed	
Cancellation Reason:	Less than 50% Classroom Attendance		Student Not Enrolled	
School Adjustment Reason:				
PHEAA Adjustment Reason:				

Student Record - Award Information Tab

Grant Information

The Grant Information section summarizes State Grant information for the year/period selected

Enrollment Information

- School OE Code/Name
- Program of Study
- Housing Status
- Enrollment Status
- Year in School
- Remedial Exception
- Classroom/Online Credits

Eligibility Information

- Award Date
- Award/Reject
- Award Counters
- Award Type
- Alternate Award (AA) – part-time eligibility if enrolled full-time
- Enrollment Status for AA
- Cancellation Reason
- School Adjustment Reason
- PHEAA Adjustment Reason
- Total College Cost
- PHEAA Estimated Pell
- PHEAA EFC

Award Information – Alternate School Choice

- School Status displays 'Secondary'
- Estimated Eligibility displayed above Grant Information section
- Warning in red indicates that a school may not use for crediting

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

Student Record: Alanna L Student

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

SSN: **XXX-XX-XXXX** ACCT#: **XX-XXXX-XXXX** Award Counter (Grand Total): **1** [Update Record](#) [Special Request](#)

2013-2014 ACADEMIC **Record Status: Complete** Last Update: **01/02/2014** **School Status: Secondary** [?](#)

Dependency Status: Dependent Last User: Received Date: **01/01/2013**

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

Student Information

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

Estimated Eligibility for Your Institution **Institutions are NOT Permitted to Use this Data to Credit an Award**

	Fall	Winter	Spring	Academic Year Total
Alternate School:	99999999-01 Pheaa University Of Harrisburg	99999999-01 Pheaa University Of Harrisburg	99999999-01 Pheaa University Of Harrisburg	
Full Time Award:	Attending Less Than Half Time		Attending Less Than Half Time	
Part Time Award:	Attending Less Than Half Time		Attending Less Than Half Time	
Housing Status	Commuter	Commuter	Commuter	

[+](#) If the student will be enrolled at your institution for the current Academic Period, you can submit a request to change the student's school to your school.
[Change Student's School](#)

Award Information – Estimated Need (February through April)

[Back to Search Results](#)

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

Student Record: Chyvonne Student L

Prior Name(s):

[View Eligibility for Student](#)

SSN: XXX-XX-XXXX

ACCT#: XX-XXXX-XXXX

Award Counter
(Grand Total): 2.25

[Update Record](#)

[Special Request](#)

2013-2014 ACADEMIC

Record Status: **Complete**

Last Update: **02/11/2013**

School Status: **Primary**

Dependency Status: **Financially Independent**

Last User:

Received Date: **01/01/2013**

[Award Information](#)

[Comment History](#)

[Activity Log](#)

[Application Info](#)

Student Information

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

Phone: **(717) 555-1212**

Email: **student@pheaa.org**

H.S. Graduation: **2002**

Grant Information

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	99999999-01 Pheaa University Of Harrisburg		99999999-01 Pheaa University Of Harrisburg	
Program of Study:	Bachelor's Degree (All Other Majors)		Bachelor's Degree (All Other Majors)	
Award Date:	02/07/2013		02/07/2013	
Housing Status:	Dormitory		Dormitory	
Enrollment Status:	Full Time Student		Full Time Student	
Award/Reject:	\$1,675.00(Est)		\$1,675.00(Est)	\$3,350.00
Alternate Award (AA)	\$837.00		\$837.00	\$1,674.00
Enrollment Status for AA:	Part-Time		Part-Time	



Award Information – Initial Need Late April

 THE FINANCIAL AID KNOW-IT-ALL

Welcome, PHEAA - Wednesday, February 13, 2014

Home | Financial Aid Services | State Grants | Loan Processing | Reports | Search Results

[Back to Search Results](#) State Grant Information for: 99999999 -01 Pheaa University Of Harrisburg

 State Grants Records are being processed for this period. Award amounts are not available.

Student Record: Chyvonne Student L

Prior Name(s):

SSN: XXX-XX-XXXX ACCT#: XX-XXXX-XXXX Award Counter (Grand Total): 1.75

[View Eligibility for Student](#) [Update Record](#) [Special Request](#)

2014-15 ACADEMIC Record Status: Complete Last Update: 02/01/2014 rol Status: Primary ?

Dependency Status: Financially Independent Last User: FGXGK Received Date: 01/03/2014

[Award Information](#) [Comment History](#) [Activity Log](#) [Application Info](#)

Student Information

Address: 1200 North 7th Street Harrisburg, PA 17102 Phone: (717) 555-1212 Email: student@pheaa.org H.S. Graduation: 2002

Warning explains

School Notes Tab

[Back to Student Listing](#)

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

Student Record: Ababuo C Student

Prior Name(s):

[View Eligibility for Student](#)

SSN: XXX-XX-XXXX

ACCT#: XX-XXXX-XXXX

Award Counter (Grand Total): 0

[Update Record](#)

[Special Request](#)

2014-2015 ACADEMIC

Record Status:

Incomplete

Last Update:

10/31/2013

School Status:

Primary

Dependency Status:

Dependent

Last User:

FGXGK

Received Date:

01/01/2014

[Award Information](#)

[School Notes](#)

[Activity Log](#)

[Application Info](#)

School Notes

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

User Name/ID	Period	Comment Date	Comment
PHEAA A STAFF	2014-2015	01/02/2014	School Notes are strictly for school use.
PHEAA A STAFF	2014-2015	01/02/2014	School Notes are strictly for school use.

Record 1 of 142 Student Records

[Next Record >](#)

- For internal use by school (not visible by PHEAA staff)
- Must be the primary school
- Add at single update or choose 'Add Another Note'
- Is NOT the same as PHEAA's Activity Log (FC5S)

Activity Tab

Award Information

School Notes

Activity Log

● Application Info

Activity Log

Display Activity for All Years

	Activity Type	Period	Description	Activity Date	Close Date	Contact Description	User
▶	Form	2013-2014	E-CHG FORM SUBMITTED BY SCHOOL - PARTNER INTERFACE	11/08/2013		From FAA	PHEAA Staff
▶	Miscellaneous	2013-2014	GRANT HOUSING CHANGE BY SCHOOL - PARTNER INTERFACE	11/07/2013	11/07/2013	To Grants	PHEAA Staff
▶	Form	2012-2013	SPECIAL REQUEST - DISBURSED - PARTNER INTERFACE	06/25/2013		From FAA	PHEAA Staff
▶	Form	2013-2014	SPECIAL REQUEST - NO DISBURSEMENT - PARTNER INTERFACE	06/25/2013		From FAA	PHEAA Staff
▶	E-mail	2012-2013	STATE GRANT ELIGIBILITY NOTICE	03/21/2013	03/21/2013	To Student	System Update

Application Info Tab

2013-2014 ACADEMIC ▾

Record Status: **Incomplete** Last Update: **12/16/2013** School Status: **Primary** ?
 Dependency Status: **Dependent** Last User: **FGXGK** Received Date: **01/01/2013**

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

Application Info

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

Information is Incomplete
 Required fields are **highlighted** below.

	Student	Parent(s)
1. Date of Birth:	07/15/1990	
2. State of Legal Residence:	PA	PA
3. Residency Established:		
4. Current Marital Status:	Unmarried/Single	Married/Remarried
5. Bachelor's Degree Before 7/1 of Application Year:	No	
6. High School Diploma or GED Date:		
7. High School State or GED:		
8A. Veteran of the U.S. Armed Forces:	No	
8B. Month/Year of Discharge:		
9. Number of Family Members:	0	3
10. Number of College Students:	0	1
	Student	Parent(s)
11. Tax Return Filed:	Have Filed	Have Filed
12. Type of Tax Return:	1040 EZ/A	1040
13. Total Number of Exemptions:	1	0

When data is 'incomplete'...

- Compare to data elements viewable on pages 2-4 of the FG59 transaction
- Look for the red 'dot' and highlights which show items required
- Compare incomplete items to the 'Student' and/or 'Parent' correctables listed on page 1 of the 'FG59' transaction

Basic Structure – View Eligibility

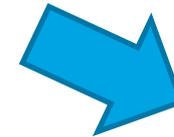
[Back to Student Listing](#)

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

Student Record: Aldonita C Applicant

Prior Name(s):

SSN: XXX-XX-XXXX ACCT#: XX-XXXX-XXXX Award Counter (Grand Total): 1



View Eligibility for Student

Update Record

Special Request

- Compare this to green screen 'FG0B' transaction
- Summarizes State Grant eligibility history and counters
- Often used for Academic Progress 'Last Award Different School'

Eligibility Record

[Back to Student Listing](#)

Eligibility Record: Aldonita C Applicant

SSN: XXX-XX-XXXX ACCT#: XX-XXXX-XXXX Award Counter (Grand Total): 0

[View Student Record](#)

Last Update: 12/16/2013 Last User: FGXGK



Term Records	2013 - 2014 Spring	2013 - 2014 Academic Total	2014 - 2015 Fall	2014 - 2015 Winter	2014 - 2015 Spring	2014 - 2015 Academic Total
Halftime:	No		No	No	No	
School Name (OE Code):	-		-	-	-	
Program of Study:						
Award/Reject:						
Remedial Exception:		0.0				0.0
Award Counters:	0	0	0	0	0	0
Academic Level:	2 - Second Academic Year		2 - Second Academic Year	-	2 - Second Academic Year	
Cancellation Reason:						
Adjustment Reason:						
PHEAA EFC:						
High School Graduate:	Yes		Yes	Yes	Yes	
Period Records			2014-2015 Academic Year			
Application Filed:			Yes			
Total Family Contribution:						
High School Grad Year:						
Veteran Status:			No			
Financial Independent Status:			No			
Inactivation Reason:						



- Scrolls right and left through years
- Term data section
- Period data section

Basic Structure – Single Updates

[← Back to Student Listing](#)

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

Student Record: Aldonita C Applicant

Prior Name(s):

SSN: XXX-XX-XXXX

ACCT#: XX-XXXX-XXXX

Award Counter (Grand Total): 1

[View Eligibility for Student](#)



[Update Record](#)

[Special Request](#)

- You must be the primary school for the term(s) being updated
- Single updates are divided into sections.
 - ★ The 'Student Record' and allows for updates to:
 - ☆ Demographics
 - ☆ School Enrollment Data
 - ☆ Credit Information
 - ★ Cancellation/Reinstatement
 - ★ Cost Override
 - ★ Award Adjustments

Student Record - Update Sections

Student Record

Demographic Information

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

School Information

	Fall	Spring
Branch Campus:	Pheaa University Of Harrisburg	Pheaa University Of Harrisburg
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)
Housing Status:	Dormitory	Dormitory
Enrollment Status:	Half-time Student	Half-time Student
.50% Classroom Attendance:	No	No

Credit Information

	Fall	Spring
Classroom Credits:	0.0	0.0
Online Credits:	0.0	0.0

Update Record

- Data in this Student Record section can be updated simultaneously
- *Cheat Sheet* lists corresponding 'Green Screen' transactions

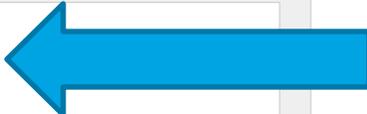
Single Update – Cancellation/Reinstatement

- Cancellations and Reinstatements must be submitted independently of other data updates
- Rejects cannot be cancelled (appear grey in color)

Cancellation or Reinstatement

	Fall	Spring
Cancellation or Reject Status:	Student Not Enrolled	Attending Less Than Half Time

Cancel/Reinstate



Cancellation or Reinstatement

	Fall	Spring
Cancellation or Reject Status:	Student Not Enrolled	Less than 50% Classroom Attendance

Cancel/Reinstate

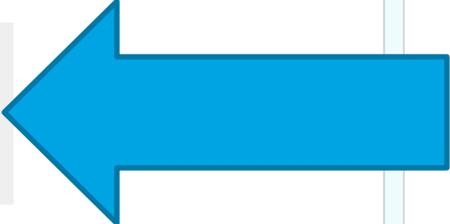


Single Update – Cost Override

- Eliminates the need to submit via 'FG11' transaction
- Cost Overrides must be submitted independently of other data updates
- Provides threshold amounts for guidance
- Provides the ability to remove a submission

Cost Override

	Fall	Spring
Amount:	<input type="text"/>	<input type="text"/>
Enrollment Status:	Full-Time	Full-Time
Tuition & Fee:	\$15,500	\$15,500
Full-time Threshold:	\$5,812	\$5,812
Part-time Threshold:		
	<input type="checkbox"/> Remove Cost Override	<input type="checkbox"/> Remove Cost Override



Single Update – Adjustments

- Eliminates the need to submit via 'FG11' transaction
- Only active if there is an award to adjust
- Adjustments must be submitted independently of other data updates

Award Adjustments

	Fall	Spring
? Adjustment Amount:	<input type="text"/>	<input type="text"/>
	<input type="text" value="- Select Reason -"/>	<input type="text" value="- Select Reason -"/>
Current Award:	\$1,850.00	\$1,850.00
	<input type="checkbox"/> Remove Adjustments	<input type="checkbox"/> Remove Adjustments

Comments may be provided for these changes.

Basic Structure – Special Requests

[Back to Student Listing](#)

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

Student Record: Aaralyn J Applicant

Prior Name(s):

SSN: XXX-XX-XXXX ACCT#: XX-XXXX-XXXX Award Counter (Grand Total): 1.34

[View Eligibility for Student](#)

[Update Record](#)

[Special Request](#)

Home | [State Grants](#) | [Loan Processing](#) | [Reports & Files](#)

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

Special Request for: Aaralyn J Applicant

Prior Names(s):

SSN: XXX-XX-XXXX ACCT#: XX-XXXX-XXXX Award Counter (Grand Total): 1.34

Period: 2013 - 2014 ACADEMIC Last Update: 12/16/2013 Last User: FGXGK

Enter your Special Request for this student record.

[Cancel](#)

[Submit Request](#)

- Are to be used as a **LAST RESORT**
- Refer to Partner Interface Q&A for guidelines

Mass Updates



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Welcome, PHEAA - Thursday, January 2, 2014

Home | State Grants | Loan Processing | Reports & Files

State Grants

▶ View State Grants Dashboard
Standard Lists and Worklists

▶ Create Mass Update Queue
Create Mass Update Queue

▶ View Weekly Update and Roster
Download from PageCenter

▶ View My Exports
View Exported Student Lists

▶ Access State Grant & Special Programs
OC/Webconnect

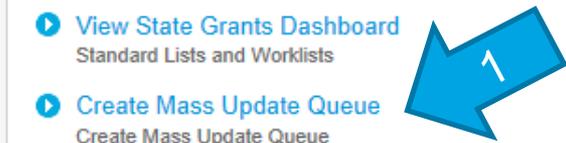
▶ State Grant Education Costs

Messages

There are currently no messages

Alerts (Notifications)

▶ You have no alerts.



Mass Update Queue

+ Create Mass Update

Queue Name	Records	Date Created	Actions
TEST	1	11/07/2013 12:16 PM	Edit Process Delete
My New Queue	21	10/30/2013 04:14 PM	Edit Process Delete
trsafaf	1	10/29/2013 02:09 PM	Edit Process Delete
cancel	1	10/21/2013 02:11 PM	Edit Process Delete
failures	2	10/21/2013 01:32 PM	Edit Process Delete

State Grant Quick Links

▶ View Weekly Update and Roster
Download from PageCenter

Navigation Links

- View State Grants Dashboard
- View My Exports
- ▶ View State Grants Dashboard
- ▶ Create Mass Update Queue
- ▶ Access State Grant & Special Programs
- ▶ View Weekly Update and Roster
- ▶ State Grant Education Costs
- ▶ State Grant Disbursement Certification
- ▶ Request Primary School Change

Mass Updates

4 Basic Steps:

1. Create a Queue – Name and Select Settings
2. Add Students to Your Mass Update Queue
3. Choose the Updates for your Queue
4. Review/Save/Process Your Mass Update Queue

Creating a Mass Update Queue – Step 1 – Name/Select Settings

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Home | State Grants | Loan Processing | Reports & Files

Step 1 of 4 - Name Your Queue and Select Settings

Mass Update Queue:

Period
Select Period and Term(s) for this Mass Update.

Branch Campus for Students to be Updated
Select the branch campus. You can only update records from one branch campus at a time.

Term(s)
 Fall Winter Spring

Update Type
Select the Type of Mass Update you would like to perform.
 Update Records Cancel or Reinstate Records

Creating a Mass Update Queue – Step 2 – Add Students

Home | State Grants ▾ | Loan Processing ▾ | Reports & Files ▾

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

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

Period: 2013-2014 ACADEMIC Campus: PHEAA UNIVERSITY OF HARRISBURG Term(s): Fall Update Type: Update Records

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

*100 Records Maximum

- Up to 100 records
- Format: 123456789 or 123-45-6789 are allowed
- Acceptable Separators between SSNs:
 - ★ 123456789,234567890 (a comma)
 - ★ 123456789 234567890 (a space, tab, or return)

Creating a Mass Update Queue – Step 2 (continued)



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Home | State Grants | Loan Processing | Reports & Files

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

Mass Update Queue: My New Queue

[Edit Queue Name](#)

Period: 2013-2014 ACADEMIC

Campus: PHEAA UNIVERSITY OF HARRISBURG

Term(s): Fall

Update Type: Update Records

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

Add Records

*100 Records Maximum

Displaying 1 - 20 out of 21 records.

	Student Name	SSN	Account #	D/O/B	Address	City	State
REMOVE	ALDONITA APPLICANT	XXXXXXXXXX	XXXXXXXXXX		1200 NORTH 7TH STREET	HARRISBURG	PA
REMOVE	BEVERLY STUDENT	XXXXXXXXXX	XXXXXXXXXX		1200 NORTH 7TH STREET	HARRISBURG	PA
REMOVE	BEECHER STUDENT	XXXXXXXXXX	XXXXXXXXXX		1200 NORTH 7TH STREET	HARRISBURG	PA
REMOVE	AALIYAH APPLICANT	XXXXXXXXXX	XXXXXXXXXX		1200 NORTH 7TH STREET	HARRISBURG	PA
REMOVE	ABRAM STUDENT	XXXXXXXXXX	XXXXXXXXXX		1200 NORTH 7TH STREET	HARRISBURG	PA
REMOVE	ALEXANDER STUDENT	XXXXXXXXXX	XXXXXXXXXX		1200 NORTH 7TH STREET	HARRISBURG	PA
REMOVE	BADEN STUDENT	XXXXXXXXXX	XXXXXXXXXX		1200 NORTH 7TH STREET	HARRISBURG	PA
REMOVE	ABIBA STUDENT	XXXXXXXXXX	XXXXXXXXXX		1200 NORTH 7TH STREET	HARRISBURG	PA
REMOVE	BIJOU STUDENT	XXXXXXXXXX	XXXXXXXXXX		1200 NORTH 7TH STREET	HARRISBURG	PA

Creating a Mass Update Queue – Step 3 – Choose Updates (Update Type)

Update Type:
Update

Update Type

Select the Type of Mass Update you would like to perform.

Update Records Cancel or Reinstate Records

 THE FINANCIAL AID KNOW-IT-ALL

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Home | State Grants | Loan Processing | Reports & Files

Step 3 of 4 - Choose the Updates for Your Queue

Mass Update Queue: My New Queue [Edit Queue Name](#)

Period: 2013 - 2014 ACADEMIC Campus: PHEAA UNIVERSITY OF HARRISBURG Term(s): Fall Update Type: Update Records

School Information

Select the changes you want to make to the student records. Leave a field blank if it does not apply for all students added to the mass queue.

Branch Campus Change:

Program of Study:

Housing Status:

Enrollment Status:

<.50% Classroom Attendance: Select if less than 50%

Credit Information

Enter the credit information you want to change on the student records. Leave a field blank if it does not apply for all students added to the mass queue. Total can not exceed 30 credits and can only be changed within the active dates.

Classroom Credits:

Online Credits:

< Previous Continue >

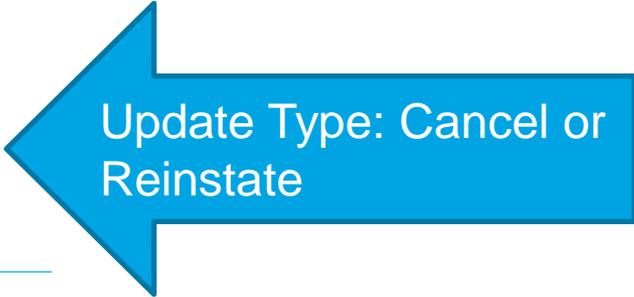
Criteria/Settings

Creating a Mass Update Queue – Step 3 – Choose Updates (Cancel/Reinstate Type)

Update Type

Select the Type of Mass Update you would like to perform.

- Update Records Cancel or Reinstate Records



Update Type: Cancel or Reinstate

Step 3 of 4 - Choose the Update Type for Your Queue

Mass Update Queue: **cancel**

 [Edit Queue Name](#)

Period: 2013-2014 ACADEMIC

Campus: PHEAA QUARTER
UNIVERSITY

Term(s): Fall

Update Type: Cancellation / Reinstatement

Cancellation

Select the type of Cancellation you want to make to the student records.

- Cancellation - Student Graduated
 Cancellation - Not Enrolled
 Cancellation - Progress Reject

Reinstatement

Select the type of Reinstatement you want to make to the student records. The Reinstatement Type must match the Cancellation type for those records.

- Reinstatement Students - Graduated
 Reinstatement Students - Now Enrolled
 Reinstatement Students - Progress Reject



Criteria or
'Settings'

[< Previous](#)

[Continue >](#)

Creating a Mass Update Queue – Step 4 - BEFORE the Queue is Processed

Step 4 of 4 - Review Your Mass Update Queue

Mass Update Queue: My New Queue

 Edit Queue Name

Period: 2013 - 2014 ACADEMIC

Campus: PHEAA UNIVERSITY OF
HARRISBURG

Term(s): Fall

Update Type: Update Records

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
BIJOU STUDENT	XXXXXXXXXX
ALICE STUDENT	XXXXXXXXXX
ABBY STUDENT	XXXXXXXXXX
BEAGAN STUDENT	XXXXXXXXXX
ABEDNEGO STUDENT	XXXXXXXXXX
ARTHUR STUDENT	XXXXXXXXXX
ABEL STUDENT	XXXXXXXXXX

Edit

Will take you back to
'Step 2'

With These Changes

Program of Study: Bachelor's Degree (All Other Majors)

Edit

Will take you back to
'Step 3'

Delete

Delete Queue

Export to Excel

RUN MASS UPDATE

Creating a Mass Update Queue – Step 4 - BEFORE the Queue is Processed/Export

Mass Update Queue: My New Queue

01/13/2014 - 10:55:40

Settings

School: PHEAA UNIVERSITY OF HARRISBURG

Period: 2013 A

Term: Fall

Update Type: UPDATE

Changes for this Mass Update:

Enrollment Status: Full Time Student

Records to be Updated

SSN	Student Name
XXXXXXXXXX	ABBY STUDENT
XXXXXXXXXX	BAKER STUDENT
XXXXXXXXXX	ABEDNEGO STUDENT
XXXXXXXXXX	ABEL STUDENT
XXXXXXXXXX	BIJOU STUDENT
XXXXXXXXXX	ALDONITA APPLICANT
XXXXXXXXXX	ABRAHAM APPLICANT

Delete Queue

Export to Excel

RUN MASS UPDATE

- Pre-formatted
 - ★ Queue Name
 - ★ Date/Time
 - ★ Settings selected
 - ★ Records selected for Update

Creating a Mass Update Queue – Step 4 - BEFORE the Queue is Processed/Run

Delete Queue

Export to Excel

RUN MASS UPDATE



THE FINANCIAL AID KNOW-IT-ALL

Welcome, PHEAA - Thursday, April 4, 2013

Home State Grants Loan Processing Reports & Files

Period: 2013 - 2014 ACADEMIC Campus: PHEAA UNIVERSITY OF HARRISBURG Term(s): Fall Update Type: Update Records

Save Your Mass Update Report

If you navigate away from this window, you will not be able to view these records any longer. Download the Excel file to ensure your mass update has processed the records correctly.

Export to Excel

Successful Updates

SSN	Student Name	Fall Award/Reject	Winter Award/Reject	Spring Award/Reject	Details
XXX-XX-XXXX	LAKAWETHIKA STUDENT	\$0		\$0	Record successfully updated.
XXX-XX-XXXX	LAINEY STUDENT	\$1,970		\$1,970	Record successfully updated.
XXX-XX-XXXX	LALAN STUDENT	\$1,970		\$1,970	Record successfully updated.
XXX-XX-XXXX	LABAN STUDENT	\$1,970		\$1,970	Record successfully updated.
XXX-XX-XXXX	LAFAYETTE STUDENT	\$1,970			Record successfullv

Creating a Mass Update Queue – Processing Results - Successful

Successful Updates

SSN	Student Name	Fall Award/Reject	Winter Award/Reject	Spring Award/Reject	Details
XXXXXXXXXX	LAKAWETHIKA STUDENT	\$0		\$0	Record successfully updated.
XXXXXXXXXX	LAINY STUDENT	\$1,970		\$1,970	Record successfully updated.

Successful Updates - Pending Review

SSN	Student Name	Details
XXXXXXXXXX	MADAN STUDENT	Update accepted but not processed - Pending PHEAA Review.
XXXXXXXXXX	MADDOX STUDENT	Update accepted but not processed - Pending PHEAA Review.

Export to Excel

Create Another Mass Update

Creating a Mass Update Queue – Processing Results - Unsuccessful

Unsuccessful Updates

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

[View Records Individually >](#)

[Export to Excel](#)

[Create Another Mass Update](#)



Creating a Mass Update Queue – Processing Results - Summary

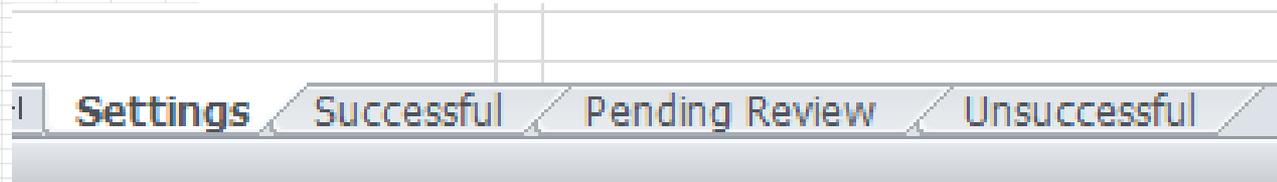
- Cycle Through Unsuccessful
- Export Results
- Create Another queue
- Quit



Creating a Mass Update Queue – Processing Results - Exporting

1	Mass Update Queue: My Test	
2	04/08/2013 - 13:51:57	
3		
4		
5	Settings	
6	School:	PHEAA UNIVERSITY OF HARRISBURG
7	Period:	2013 A
8	Term:	Fall
9	Update Type:	CANCEL_REINSTATE
10		
11		
12	Changes for this Mass Update:	
13	Cancel/Reinstate Status:	Cancellation - Not Enrolled
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- Settings Tab
 - ★ Queue Name
 - ★ Date/Time
 - ★ Settings selected
- Successful Tab
- Pending Review Tab
- Unsuccessful Tab



Additional Resources

- Available at:
www.PHEAA.org/training
 - » Partner Interface User Guide
 - » Partner Interface Cheat Sheet
 - » Question and Answer Guide
 - » Tutorials
 - » Partner Interface Overview – Part 2



» Partner Interface Training

Let us help you keep current with the latest tools for postsecondary schools to report and verify key components used in evaluating eligibility and disbursement for State Grant awards.

» State Grant Training

View and download a wide range of resources that will provide you with program-specific information that are essential for your staff and students.

» PA-TIP Training

View and download a wide range of resources that will provide you with program-specific information that are essential for your staff and students.

» Training Events

View our training events, including those sponsored by Pennsylvania Financial Aid Training (PFAT), Pennsylvania School Services, and Pennsylvania State Grant and Special Programs.

» K-12 Counselor Workshops

To ensure you have the tools students need to reach their educational goals, we offer free workshops for high school counselors and teachers.

Resources

Contact State Grant and Special Programs staff:

★ Email: sghelp@pheaa.org

★ Reserved for Financial Aid Administrators Only

★ 1-800-443-0646, Option 4

★ To Discuss Transmissions

★ 1-800-443-0646, Option 3, Option 1

★ Reserved for Financial Aid Administrators Only