

# PHEAA TRAINING

## Partner Interface Overview Part 2

Pennsylvania State Grant Program

# Purpose of this Webinar

- Explain:

- ★ State Grant Dashboard
- ★ Filtering
- ★ Requesting School Changes
- ★ Printing
- ★ Other Updates

- Provide awareness of self-service training opportunities

- ★ [www.PHEAA.org/training](http://www.PHEAA.org/training)

- Request feedback

# Dashboard and Student Listings

SSN or Last Name  Search

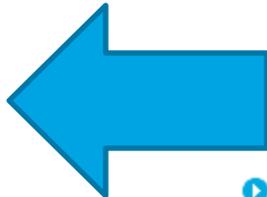


THE FINANCIAL AID KNOW-IT-ALL

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
- ▶ State Grant Disbursement Certification  
Disbursement Certification Form



File Edit View Favorites Tools Help

SSN or Last Name  Search

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State Grants

- ▶ View State Grants Dashboard
- ▶ View My Exports
- ▶ 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

Navigation Links

- ▶ My Exports
- ▶ Exported Student Lists
- ▶ Access State Grant & Special Programs
- ▶ State Grant Education Costs
- ▶ Disbursement Certification Form
- ▶ Request Primary School Change
- ▶ Change Primary School in Student Record



# Dashboard and Student Listings

## State Grants Dashboard

2013-2014 ACADEMIC

period for: All Schools

Record Status	Total Records	Updates By	1/25 - 1/31	2/1 - 2/7	2/8	2/9	2/10	2/11	2/12	2/13	TODAY
<b>Complete - Active</b> Eligibility has been determined for these records. Some of the terms may include need based rejects.	231	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	3	4	0	0	0	0	2	37	0
		<b>Total</b>	3	4	0	0	0	0	2	37	0
<b>Incomplete - Active</b> These records are missing information or are under review. Some of the terms may include rejects for 'High EFC'.	25	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	0	0	0	0	0
		<b>Total</b>	0	0	0	0	0	0	0	0	0
<b>All Records</b> Includes complete and incomplete records for Active, Reject and Inactive statuses	274	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	3	4	0	0	0	0	2	37	0
		<b>Total</b>	3	4	0	0	0	0	2	37	0

SHOW MORE STATUSES

Mass Update Queue



+ Create Mass Update

State Grant Quick Links



# Dashboard and Student Listings

Record Status	Total Records	Updates By	9/10 - 9/16	9/17 - 9/23	9/24	9/25	9/26	9/27	9/28	9/29	TODAY 9/30
<b>COMPLETE - ACTIVE</b> Eligibility has been determined for these records. Some of the terms may include need based rejects.	30	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	1	28	1	1	1	0	0	0	0
		<b>Total</b>	1	28	1	1	1	0	0	0	0
<b>INCOMPLETE - ACTIVE</b> These records are missing information or are under review. Some of the terms may include rejects for 'High EFC'.	297	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	296	0	0	1	0	0	0	0
		<b>Total</b>	0	296	0	0	1	0	0	0	0
<b>COMPLETE - REJECT</b> These records include non-need rejects for some of the terms.	3	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	3	0	0	0	0	0	0	0
		<b>Total</b>	0	3	0	0	0	0	0	0	0

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

<b>INCOMPLETE - REJECT</b> These records include non-need rejects for some of the terms and are missing information or under review.		School	0	0	0	0	0	0	0	0	0
<b>ALL RECORDS</b> Includes complete and incomplete records for Active, Reject and Inactive statuses	351	PHEAA/Students	1	346	1	1	2	0	0	0	0
		<b>Total</b>	1	346	1	1	2	0	0	0	0
		▲ HIDE OTHER STATUSES									

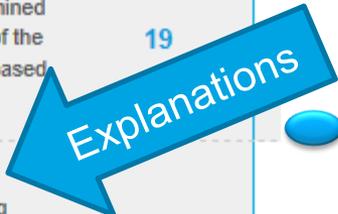
<b>COMPLETE - INACTIVE</b> These records have been declared Inactive by PHEAA.		School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	1	346	1	1	2	0	0	0	0
		<b>Total</b>	1	346	1	1	2	0	0	0	0



# Dashboard and Student Listings

## RECORD STATUS

Record Status	Total Records
<b>Complete - Active</b> Eligibility has been determined for these records. Some of the terms may include need based rejects.	19
<b>Incomplete - Active</b> These records are missing information or are under review. Some of the terms may include rejects for 'High EFC'.	1
<b>Complete - Reject</b> These records include non-need rejects for some of the terms.	2
<b>Incomplete - Reject</b> These records include non-need rejects for some of the terms and are missing information or under review.	1



Explanations

- Be aware of what can be included in each status

- Status is Record (not term) Level - *Examples*

- ★ **Complete-Active** – Records include those that have been awarded, rejected for a 'Need' reason (E, M, or Y), cancelled, or adjusted to zero (which results in Reject M).

- ★ **Complete-Reject** – Records may be non-need reject for one term/awarded for another

# Dashboard and Student Listings

## TOTAL RECORDS IN EACH STATUS OPTIONS:

Record Status	Total Records	Updates By	9
<b>COMPLETE - ACTIVE</b> Eligibility has been determined for these records. Some of the terms may include need based rejects.	<b>30</b>	School PHEAA/Students	
<b>INCOMPLETE - ACTIVE</b> These records are missing information or are under review. Some of the terms		<a href="#">View Records List</a> <a href="#">Process Records Individually</a> <a href="#">Export Records List</a>	

# Dashboard and Student Listings

## 'ALL RECORDS' - 2 OPTIONS

<b>ALL RECORDS</b> Includes complete and incomplete records for Active, Reject and Inactive statuses	351	School	
<b>▲ HIDE OTHER STATUSES</b>		PHEAA/Students	
	<a href="#">View Records List</a>		
	<a href="#">Export Records List</a>		

- Size Limitations
  - ★ Cannot Process Records Individually in 'All'
  - ★ May be forced to Filter Lists

# View Records List

## Filter

TOTAL RECORDS ▾

COMPLETE - ACTIVE 30

INCOMPLETE - ACTIVE 297

COMPLETE - REJECT 3

INCOMPLETE - REJECT 21

COMPLETE - INACTIVE 0

INCOMPLETE - INACTIVE 0

ALL RECORDS 351

### Filter Records Hide Filters

Record Level Filters

Special Conditions:

Term Level Filters  Fall  Winter  Spring  Any

**?** Eligibility Date: From:  To:

Eligibility Status:  Credit Info:  Housing Status:

Enrollment Status:

Cancellation Reasons:

Program of Study:

**Results: 30 Records**

Displaying 1 - 20 out of 30 Student Records

- Reasons to filter:
  - ★ Required to filter (size limit/threshold)
  - ★ Narrow down list for specific criteria

# View Records List

## Filter

### STEP 1: ADD FILTERS

### Filter Records

No filters have been applied. [Add Filters.](#) 

Displaying 1 - 20 out of 281 Student Records Export to Excel/CSV Go to First Record >

Records Selected (0) Add to New Mass Update

Note: Filters are NOT available under Inactive record statuses.

# View Records List

## Filter

# STEP 2: SELECT CRITERIA

State Grant Records

2013-2014 ACADEMIC period for: 99999997 PHEAA QUARTER UNIVERSITY

TOTAL RECORDS

- Complete - Active 19
- Incomplete - Active 1
- Complete - Reject 2
- Incomplete - Reject 1
- Complete - Inactive 0
- Incomplete - Inactive 0

All Records 23



Filter Records

Hide Filters

Record Level Filters

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

Special Conditions: - Select -

Term Level Filters  Fall  Winter  Spring  Any

Eligibility Date: From: mm/dd/yyyy To: mm/dd/yyyy

Distance Education Program:

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

Enrollment Status:

Full Time Student  
Full Time-Evening  
Half-time Student  
Attending less Than Half-Time

Cancellation Reasons:

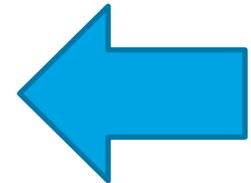
Graduated from a Bachelor's Deg  
Not a High School Graduate  
Death of Student  
Cancelled due to Agency Error

Program of Study:

5 Year Co-op Work-Study (All Ma  
Bachelor's Degree (Religion Majc  
Bachelor's Degree (All Other Maj  
2 Year Terminal Proq in a 4 Year

Results: 23 Records

Reset Filters Apply Filters



# View Records List

## Filter

### Filter Records

Record Level Filters

Special Conditions:  

Term Level Filters

Collectibles  
Validation Processing  
Late Processing

ring  Any

- Record Level - Complete and 'All' Categories ONLY
- Special Conditions
  - ★ Collectables
  - ★ Validation
  - ★ Late Processing – PHEAA special deadline extensions (NOT Reject L's)

# View Records List

## Filter

Filter Records Hide Filters

Term Level Filters  Fall  Winter  Spring  Any

**Eligibility Date:** From:  To:  Distance Education Program:

Eligibility Status:  Credit Info:  Housing Status:

Enrollment Status:   
Full Time-Evening  
Half-time Student  
Attending less Than Half-Time

Cancellation Reasons:   
Student Not Enrolled  
Income or Asset Review  
Less than 50% Classroom Attend

Program of Study:   
Bachelor's Degree (Religion Majc  
Bachelor's Degree (All Other Maj  
2 Year Terminal Prog in a 4 Year

Results: 231

Displaying 1 - 25

11 6 0 1 274

**Eligibility Date** Close

The date when eligibility (award or reject) was determined or the date an award was cancelled or adjusted.

**Eligibility Date:** From:  To:

Eligibility Status:  Credit Info:  Housing Stat

Enrollment Status:   
2 - Full Time-Evening  
3 - Half-time Student

Cancellation Reasons:   
B - Not a High School Graduate  
D - Death of Student

### Term Level

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

# View Records List

## Filter

### Student Information

Address: 1200 North 7th Street Harrisburg, PA 17102 Phone: (717) 555-1212 Email: student@pheaa.org H.S. Graduation: 20

### 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:	09/09/2013	09/09/2013	09/09/2013	
Housing Status:	Commuter	Commuter	Commuter	
Enrollment Status:	Full Time Student	Full Time Student	Full Time Student	
Award/Reject:	Pending	Pending	Pending	
Alternate Award (AA)	Pending	Pending	Pending	
Enrollment Status for AA:	Part-Time	Part-Time	Part-Time	
Remedial Exception:				0.0
Award Counters:	0	0	0	0

● Pending

★ Can appear in any Record Status upon Filter

★ Record may not appear when drilling down with term level filters

# View Records List

## Filter

# STEP 3: APPLY OR RESET FILTERS

### Filter Records Hide Filters

Term Level Filters  Fall  Winter  Spring  Any

Eligibility Date: From:  To:  Distance Education Program:

Eligibility Status:  Credit Info:  Housing Status:

Enrollment Status:

Cancellation Reasons:

Program of Study:

Results: **19 Records**



# View Records List

## Filter

# STEP 4: USE YOUR RESULTS

### Enrollment Status:

- 1 - Full Time Student
- 2 - Full Time-Evening
- 3 - Half-time Student
- 4 - Less Than Half-Time

### Cancellation Reasons:

- A - Graduated from a Bachelor's
- B - Not a High School Graduate
- D - Death of Student
- E - Cancelled due to Agency Error

### Program of Study:

Results: **91 Records**

Reset Filters

Apply Filters

Displaying 1 - 20 out of 91 Student Records

Option 1

Export to Excel/CSV

Go to First Record >

Option 2

Records Selected (0)

Add to New Mass Update

Option 3

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
<input type="checkbox"/> STUDENT, GRETEL M 1200 NORTH 7TH STREET HARRISBURG, PA 17102	XXXXXXXX	0.5	\$1,995 Full Time Student Dormitory		Grant Cancelled - A Full Time Student Dormitory	\$1,995

# After Filter: Option 1

## Export to Excel or CSV file

### STEP 1: SELECT EXPORT

Eligibility Status:  Credit Info:  Housing Status:

Enrollment Status:   
2 - Full Time-Evening  
3 - Half-time Student  
4 - Less Than Half-Time

Cancellation Reasons:   
B - Not a High School Graduate  
D - Death of Student  
E - Cancelled due to Agency Error

Program of Study:

**Results: 88 Records**

Displaying 1 - 20 out of 88 Student Records



Records Selected (0)

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
<input type="checkbox"/> [REDACTED] 1200 NORTH 7TH STREET HARRISBURG, PA			\$1,995 Full Time Student Dormitory		Grant Cancelled - A Full Time Student	\$1,995

**Mass Update ONLY!**

# After Filter: Option 1

## Export to Excel or CSV file

### STEP 2: NAME AND CHOOSE FORMAT

● Choose:

- ★ Excel for full descriptions; not using for automated processing
- ★ CSV for automated processing

**Export Student Records** Close

Name:   
Name cannot exceed 30 characters (including spaces). Special characters and numbers are allowed except first position.

Description:   
Maximum of 255 characters (including spaces).

Format:  ▼  
Excel - List will be exported with descriptions instead of codes. This will be similar to the Student Records List.  
CSV - List will be exported with codes in the Grant Applicant Status Transmission format. This file can be imported into your FAMS system.

Displaying 1 - 19 out of 19 Student Records Export to Excel/CSV Go to First Record >

# After Filter: Option 1

## Export to Excel or CSV file

### STEP 3: SUBMIT

Home | State Grants | Loan Processing | Reports & Files

### State Grant Records

2013-2014 ACADEMIC period for: 999 PHEAA UNIVERSITY OF HARRISBURG

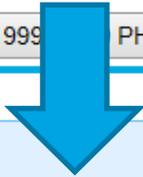
**TOTAL RECORDS** 228

COMPLETE - ACTIVE 228

INCOMPLETE - ACTIVE 19

**Congratulations!**  
You have successfully submitted your request to export the list. Click [here](#) to go to 'My Exports' to download the file.

Filter Records [Hide Filters](#)

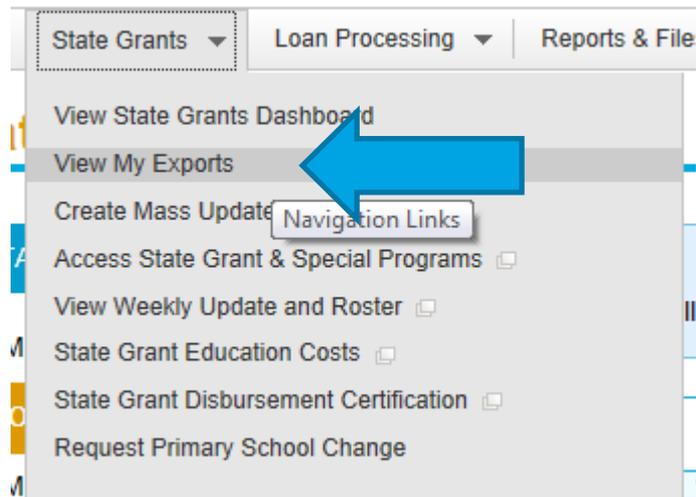


- Results – ‘My Exports’
  - ★ Click [here](#); or
  - ★ Access via Home page

# After Filter: Option 1

## Export to Excel or CSV file

- Drop Down; or
- State Grant Links; or
- Alerts



Welcome, PHEAA Monday, September 30, 2013

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
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Download from PageCenter
- State Grant Disbursement Certification  
Disbursement Certification Form
- View My Exports  
View Exported Student Lists
- Access State Grant & Special Programs  
OC/Webconnect
- State Grant Education Costs  
Education Cost Form
- Request Primary School Change  
Change Primary School in Student Record

### Messages

There are currently no messages.

### Alerts (Notifications)

- You have 1 exports in progress
- You have 6 exports ready to download

[View My Exports](#)

# After Filter: Option 1

## Export to Excel or CSV file

### My Exports

#### Requests In Progress

Export Name		Date Requested	Action
twenty	<a href="#">View Details</a>	09/26/2013 12:50:00 PM	<input type="button" value="Cancel"/>

#### Requests Ready To Download

Export Name		Date Completed	Action
PA Health	<a href="#">View Details</a>	09/27/2013 03:02:55 PM	<input type="button" value="Download"/> <input type="button" value="Delete"/>
PASFAA	<a href="#">View Details</a>	09/30/2013 09:55:24 AM	<input type="button" value="Download"/> <input type="button" value="Delete"/>

#### Requests That Have Been Downloaded

Export Name		Date Last Downloaded	Action
AB-F-DORM	<a href="#">View Details</a>	09/24/2013 12:41:06 PM	<input type="button" value="Download"/> <input type="button" value="Delete"/>
All Bloom	<a href="#">View Details</a>	09/23/2013 04:48:40 PM	<input type="button" value="Download"/> <input type="button" value="Delete"/>

-  In Progress
-  Come back later
-  Ready
-  Previously Downloaded

# After Filter: Option 2

## Cycle Through Records

**Enrollment Status:**  
1 - Full Time Student  
2 - Full Time-Evening  
3 - Half-time Student  
4 - Less Than Half-Time

**Cancellation Reasons:**  
A - Graduated from a Bachelor's I  
B - Not a High School Graduate  
D - Death of Student  
E - Cancelled due to Agency Error

**Program of Study:**

Reset Filters Apply Filters

Displaying 1 - 20 out of 230 Student Records

Ex  Go to First Record >

Records Selected (0) Add to New Mass Update

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
APPLICANT, AARON R 1200 NORTH 7TH	XXXXXXXX	0.25	\$533 Half-time Student		Grant Cancelled - G	\$533

- Individual Records
- Year selected
- 'One at a time':
  - ★ View
  - ★ Update

# After Filter: Option 2

## Cycle Through Records

The screenshot shows the Alec financial aid system interface. At the top left is the Alec logo with the tagline "THE FINANCIAL AID KID". The top right displays "Welcome, PHEAA" and the date "Tuesday, October 1, 2013". A navigation bar includes "Home", "State Grants", and "Loan Processing". Below this, a grey bar contains buttons for "Previous Record", "Record 16 of 18 Student Records", and "Next Record". A blue arrow labeled "Total Records" points to the "Record 16 of 18 Student Records" text. A blue arrow labeled "Next" points to the "Next Record" button. A blue arrow labeled "Back to List" points to a link that says "Back to Student Listing". The main content area shows "Student Record: Madeleine J Student" and "State Grant Information for: 99999997-01 Pheaa Quarter University". There are buttons for "View Eligibility for Student", "Update Record", and "Special Request". A dropdown menu is set to "2013-2014 ACADEMIC", with a blue arrow labeled "For Year Selected" pointing to it. Below the dropdown, there are fields for "SSN: XXX-XX-XXXX", "ACCT#: 75-3486-7995", and "Award Counter (Grand Total): 0.67". Further down, there are fields for "Dependency Status: Financially Independent", "Last Update: 09/30/2013", "School Status: Primary", "Last User: PHEAA", and "Received Date: 01/01/2013". At the bottom, there are tabs for "Award Information", "School Notes", "Activity Log", and "Application Info".

# After Filter: Option 2 Cycle Through Records

**Alec** THE FINANCIAL AID KNOW-IT-ALL

Welcome, PHEAA - Tuesday, October 1, 2013

Home | State Grants | Loan Processing | Reports & Files

«Previous Record | Record 16 of 18 Student Records | Next Record »

« Back to Student Listing

State Grant Information for: 99999997-01 Pheaa Quarter University

## Update Record: Madeleine J Student

Prior Name(s):

SSN: XXX-XX-XXXX | ACCT#: XX XXXX XXXX | Award Counter (Grand Total): 0.67

View Record | Special Request

---

2013-2014 ACADEMIC

Record Status:	Complete	Last Update:	09/30/2013	School Status:	Primary ?
Dependency Status:	Financially Independent	Last User:	PHEAA	Received Date:	01/01/2013

Award/Reject Fall:	Grant Cancelled	Winter:	\$1,313	Spring:	\$1,313
--------------------	-----------------	---------	---------	---------	---------

[Cancel/Reject](#) | [Cost Override](#) | [Award Adjustment](#) | [Distance Education Program](#)

### Student Record

Update Record

Demographic Information

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

Phone: (717) 555-1212

Email: student@pheaa.org

School Information

- Can choose to Update and Cycle in 'Update' mode and submit necessary corrections

# After Filter: Option 3

## Create Mass Update Queue

Enrollment Status: 1 - Full Time Student, 2 - Full Time-Evening, 3 - Half-time Student, 4 - Less Than Half-Time

Cancellation Reasons: A - Graduated from a Bachelor's, B - Not a High School Graduate, D - Death of Student, E - Cancelled due to Agency Error

Program of Study:

Reset Filters Apply Filters

Displaying 1 - 20 out of 230 Student Records Export to Excel/CSV Go to First Record >

Records Selected (0) Add to New Mass Update

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
<input type="checkbox"/> APPLICANT, AARON R 1200 NORTH 7TH	XXXXXXXX	0.25	\$533 Half-time Student		Grant Cancelled - G	\$533

- Select records ON PAGE
- 'Add to New Mass Update' queue
- ★ Limited to 100 records (5 pages)

# Request School Change

SSN or Last Name Search Your Account Contact Us Logout

Welcome, PHEAA Monday, September 16, 2013

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Home State Grants Loan Processing Reports & Files

### State Grants

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Disbursement Certification Form
- View My Exports  
View Exported Student Lists
- Access State Grant & Special Programs  
OCWebconnect
- State Grant Education Costs  
Education Cost Form
- Request Primary School Change  
Change Primary School in Student Record**

### Messages

There are currently no messages

### Alerts (Notifications)

- You have 3 exports ready to download  
View My Exports

### Order Materials

- Replaces FG5T
- Accessible on Menu

SSN or Last Name Search Your Account Contact Us Logout

Welcome PHEAA September 16, 2013

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Home State Grants Loan Processing Reports & Files

### State Grants

- View State Grants Dashboard
- View My Exports
- 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**

### Messages

There are currently no messages

### Alerts (Notifications)

- You have 3 exports ready to download  
View My Exports

### Order Materials

Program Materials  
Order loan processing forms, brochures & guides for students, or deferment and discharge forms.

### Training & Publications

Training Event Schedule  
View upcoming training opportunities offered by AES.

# Request School Change

Home | State Grants | Loan Processing | Reports & Files

## Change Primary School Request

SSN:

---

Changes submitted will be reviewed by PHEAA.

Period: 2013 - 2014 ACADEMIC

Student's Last Name:

When submitting this form prior to the start of the term and/or student's actual enrollment, I am verifying that a statement from the student authorizing the enrollment change is on file.

---

### School Information

Enter detailed information for each available term. All fields are required.

	Fall	Winter	Spring
Branch Campus:	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>
Program of Study:	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>
Housing Status:	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>
Enrollment Status:	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>

- Result when choose from Home Page Menu
- Not accessible - Grey
- ★ Fall (after Sept 30)

# Request School Change

- Not Primary
- IS Alternate
- ★ SSN and Name will prepopulate

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	
Full Time Award:	\$1,995		\$1,995	\$3,990
Part Time Award:	\$997		\$997	\$1,994
Housing Status	Off Campus		Off Campus	

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

# Request School Change

## Change Primary School Request

SSN: XXX-XX-XXXX

Changes submitted will be reviewed by PHEAA.

Period: 2013 - 2014 ACADEMIC

Student's Name: MICHELE STUDENT

When submitting this form prior to the start of the term and/or student's actual enrollment, I am verifying that a statement from the student authorizing the enrollment change is on file.

## School Information

Enter detailed information for each available term. All fields are required.

	Fall	Winter	Spring
Branch Campus:	- Select -	99999997-01 Pheaa Qu	99999997-01 Pheaa Qu
Program of Study:	- Select -	C-Bachelor's Degree (AI)	C-Bachelor's Degree (AI)
Housing Status:	- Select -	1-Dormitory	1-Dormitory
Enrollment Status:	- Select -	1-Full Time Student	1-Full Time Student

Cancel Submit

# IMPORTANT!

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

## STEP 1: SELECT TAB



THE FINANCIAL AID KNOW-IT-ALL

Home | State Grants | Loan Processing | Reports & Files

State Grant Information for: 99999997-01 Pheaa Quarter University

### Student Record: Laban X Student

Prior Name(s):

[View Eligibility for Student](#)

SSN: XXX-XX-XXXX    ACCT#: XX XXXX XXXX    Award Counter (Grand Total): 0.66

[Update Record](#)

[Special Request](#)

2013-2014.ACADEMIC

Record Status: **Complete**

Last Update: **09/13/2013**

School Status: **Primary**

Dependency Status: **Financially Independent**

Last User: **PHEAA**

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

[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**

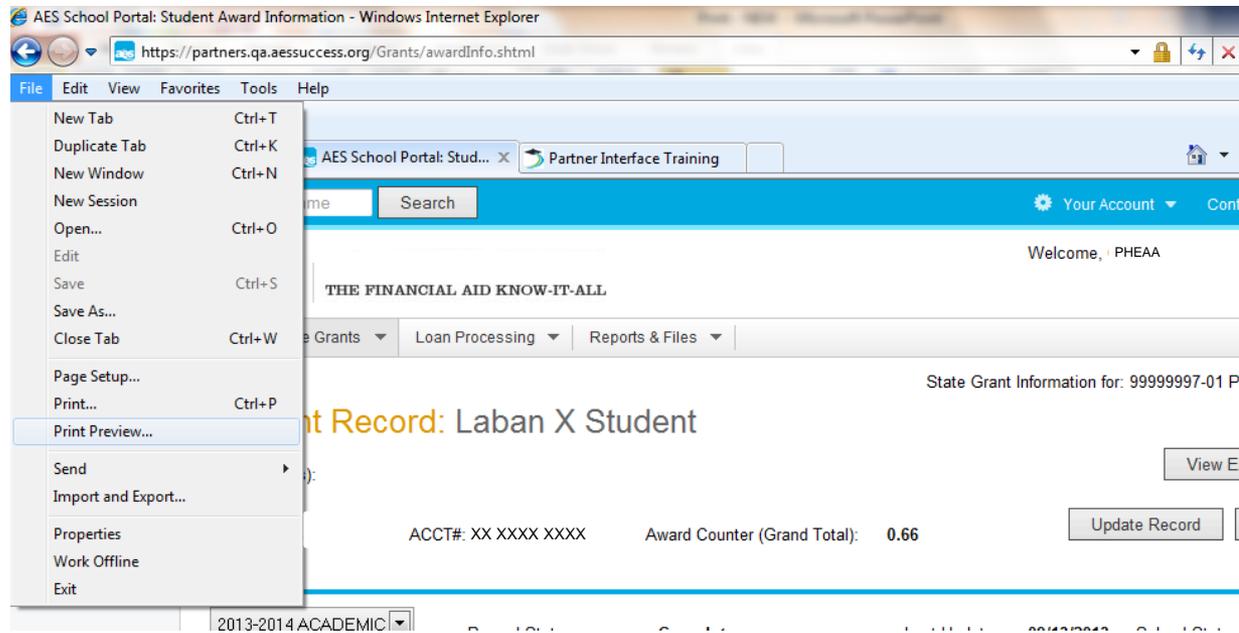
H.S. Graduation: **2005**

### Grant Information

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	
Program of Study:	Registered Nursing Program	Registered Nursing Program	Registered Nursing Program	
Award Date:	09/13/2013	09/13/2013	09/13/2013	

# Print

## STEP 2: SELECT FILE AND PRINT PREVIEW



**NOT FOLLOWING STEPS WILL RESULT  
IN MULTI PAGES**

# Print

## STEP 3: REDUCE PRINT SIZE

The screenshot shows a 'Print Preview' window with a 'Shrink To Fit' dropdown menu open. The menu options are: Shrink To Fit, 30%, 50%, 60% (highlighted), 70%, 80%, Change Print Size (Alt+S), 90%, 100%, 125%, 150%, 200%, and Custom. The document content includes:

- Record: **Laban X Student**
- 2013-2014 ACADEMIC Record Status: Complete, Last Update: 09/13/2013, School Status: Primary
- Student Information: 1200 North 7th Street, Harrisburg, PA 17102, Phone: (717) 555-1212, Email: student@pheaa.org, H.S. Graduation: 2005
- Grant Information table:

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	9999997-01 Pheaa Quarter University	9999997-01 Pheaa Quarter University	9999997-01 Pheaa Quarter University	
Program of Study:	Registered Nursing Program	Registered Nursing Program	Registered Nursing Program	
Award Date:	09/13/2013	09/13/2013	09/13/2013	
Housing Status:	Dormitory	Dormitory	Dormitory	
Enrollment Status:	Full Time Student	Full Time Student	Full Time Student	
Award/Reject:	\$1,313	\$1,313	Grant Cancelled	\$2,626
Alternate Award (AA)	\$656	\$656	\$0	\$1,312

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

# Other Updates

The screenshot shows the Alec website interface. At the top, there is a search bar for "SSN or Last Name" and a search button. To the right are links for "Your Account", "Contact Us", and "Logout". Below this is the Alec logo with the tagline "THE FINANCIAL AID KNOW-IT-ALL" and the date "Welcome, PHEAA - Tuesday, September 17, 2013". A main navigation bar includes "Home", "State Grants", "Loan Processing", and "Reports & Files". A dropdown menu for "State Grants" is open, listing various options. The item "State Grant Disbursement Certification" is circled in blue. Other items in the menu include "View State Grants Dashboard", "View My Exports", "Create Mass Update Queue", "Access State Grant & Special Programs", "View Weekly Update and Roster", "State Grant Education Costs", and "Request Primary School Change".

● Access to the Document Library

- ⊗ [Main Menu](#)
- ⊗ [Asset Management Reports Documentation](#)
- ⊗ [BPAMS: Business Partner Access Management System](#)
- ⊗ [Compliance](#)
- ⊗ [Newsletters](#)
- ⊗ [Financial Aid Services](#)
- ⊗ [Loan Origination/FTS Refund](#)
- ⊗ [OC Webconnect](#)
- ⊗ [PA School Services](#)
- ⊗ [PageCenter Guide](#)
- ⊗ [Special Programs](#)
- ⊗ [State Grant Program](#)

[Main Menu](#) / [State Grant Program](#) / Certification Procedures, Workshop Materials and Roster Certification Page

- ▣ [2013-14 Academic Year and 2014 Summer Certification Procedures - dlr2065](#)
- ▣ [2013-14 Certification Procedures Workshop Presentation - dlr2079](#)
- ▣ [2013-14 Certification Procedures Workshop Q&A - dlr2086](#)
- ▣ [2013-14 Credit Reporting Q&A - dlr2087](#)
- ▣ [Income Validation Handout - dlr2066](#)
- ▣ [Transmission Best Practices Handout - dlr2064](#)
- ▣ [2012-13 Academic year and 2013 Summer Certification Procedures - dlr1254](#)
- ▣ [2012-13 Certification Procedures Workshop Presentation \(Power Point Presentation\) - dlr1859](#)
- ▣ [2012-13 Certification Procedures Workshop Q&A - dlr1999](#)
- ▣ [2013-14 State Grant Disbursement Roster Certification Page \(Including Summer 2014\) - grantRosterDisbCurrent](#)
- ▣ [2012-13 State Grant Disbursement Roster Certification Page \(Including Summer 2013\) - grantRosterDisbPrior](#)

# Other Updates

## ACTIVITY LOG

- Displays 'System' instead of blank if update was a program
- Displays Period
  - ★ Display Activity for All Years
  - ★ No Arrow if no detail

Activity Type	Period	Description	Activity Date	Close Date	Contact Description	User
▶ Miscellaneous	2013-2014	GRANT ENROLLMENT CHANGE BY SCHOOL - PARTNER INTERFACE	04/12/2013	04/12/2013	To Grants	PHEAA
▶ SC	2013-2014	GRANT ENROLLMENT CHANGE BY SCHOOL - PARTNER INTERFACE	04/10/2013	04/10/2013	70	PHEAA
▶ SC	2013-	PROGRAM OF STUDY CHANGE BY	04/10/2013	04/10/2013	70	PHEAA

# Resources

- Additional Partner Interface Resources:  
[www.PHEAA.org/training](http://www.PHEAA.org/training)  
★ Tutorials, User Guide, Cheat Sheet, Filtering Tips, etc.
- Contact State Grant and Special Program staff:  
★ Email: [sghelp@pheaa.org](mailto: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



## 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.