

# PHEAA TRAINING

Grants Procedure • January 2014

**GRANTS PARTNER INTERFACE Q & A**

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# INTRODUCTION

The Grants Partner Interface is an Internet portal that allows school users to manage Pennsylvania State Grant student records via the Web. School users can search for, view, and update individual student records; view eligibility records (history); submit special requests when changes cannot be made on the portal; use mass update queues to update multiple student records; and access recently updated student listings through a State Grant dashboard.

# TRAINING RESOURCES

PHEAA offers self-service training documents on [PHEAA.org/training](http://PHEAA.org/training) under **Partner Interface**. Please check back regularly for updates.

## These offerings include:

- **Navigational Tutorials** – Each tutorial, approximately 5 minutes, walks users through accessing the various screens within the Interface.
- **User Guide** – This document, in pdf format, explains the labels and data used in the Interface.
- **Webinars** – Each pre-recorded session requires about 30 minutes of your time and illustrates how updates are made to student records.
- **Cheat Sheet** – This document provides a quick comparison of the mainframe system to the Interface.

# VIEWING AND PRINTING DATA

## Home Page

### Did the Alec home page change?

The Alec home page was reorganized on June 27, 2013. Items such as Messages, Training Tutorials, & Publications (Document Library) now appear in a column format on the right side of the page.

The screenshot displays the Alec home page interface. At the top, there is a search bar for "SSN or Last Name" and a "Search" button. To the right, there are links for "Your Account", "Contact Us", and "Logout". The main header features the Alec logo and the tagline "THE FINANCIAL AID KNOW-IT-ALL", along with the date "Wednesday, July 17, 2013". Below the header is a navigation menu with "Home", "State Grants", "Loan Processing", and "Reports & Files". The main content area is divided into three columns. The left column contains sections for "State Grants" (with links like "View State Grants Dashboard", "Create Mass Update Queue", "View Weekly Update and Roster", "State Grant Disbursement Certification") and "Loan Processing" (with links like "Real-time Processing with AES Loans", "Direct Access to the AES System"). The middle column contains "Reports & Files" (with links like "Standard Reports", "Loan Entrance/Exit Counseling"). The right column contains "Messages" (stating "There are currently no messages"), "Alerts (Notifications)" (with a notification "You have 2 exports ready to download"), "Order Materials" (with "Program Materials"), and "Training & Publications" (with "Training Event Schedule", "Document Library", "Loan Notes", "Common Manual"). At the bottom of the right column is "Default Prevention".

## Viewing Student Records

### I don't see 'Partner Interface' on Alec. How do I view a student?

The Partner Interface does not exist as a link in Alec. The tools for viewing individual records and accessing records exist within the Home Page. To view an individual student, enter the student's SSN in the search box located in the upper left corner. You may also enter the Last Name or wildcard with a last name using a minimum of three characters followed by an asterisk (\*). If more than one student exists with the name entered, a list of students to choose from will display.

SSN or Last Name	Search
------------------	--------


THE FINANCIAL AID KNOW-IT-ALL

### Why can't I view a **Student Record**?

If you cannot find a student using their last name then the student didn't file a FAFSA or they didn't list your school on the FAFSA. Their name will not appear on the list in either of these instances. This holds true whether you are searching for a student via the Partner Interface or the State Grant mainframe transactions.

### I refer to the Professional Judgment item found on page 8 of FG59. Will this field be added to the student data?

There are no immediate plans to add this field to the Interface. PHEAA will continue to evaluate the need for this and other items on the **Student Record**.

### I am confused by the status of a student as their record is incomplete but there are no incomplete items on the App Info tab. The message refers me to Activity but there is no further information on that tab.

PHEAA is working on better messaging for these situations. Most likely, this student indicated enrollment in a graduate program and was not processed for State Grant consideration. This is one of the reasons that item 430 is a PHEAA Correctable on the mainframe display, FG59.

## Award Tab

### What is the Alternate Award (AA)?

The Alternate Award (AA) is the possible eligibility if enrollment changes. For example, for a student with an award based on full-time enrollment, the alternate award displays potential part-time eligibility.

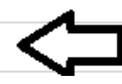
Enrollment Status:	Full Time Student
Award/Reject:	\$1,200
Alternate Award (AA)	\$616
Enrollment Status for AA:	Part-Time

**Why does the Alternate Award (AA) appear on an adjusted award?**

The Partner Interface is currently displaying an amount in the alternate award on adjusted records when it should display 'Not Applicable'. Do not provide this amount to students.

**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:	06/13/2013	06/13/2013	06/13/2013	
Housing Status:	Dormitory	Dormitory	Dormitory	
Enrollment Status:	Full Time Student	Full Time Student	Full Time with 1-3 credits Remedial	
Award/Reject:	\$1,200	\$1,233	Grant Cancelled	\$2,433
Alternate Award (AA)	\$616	\$616	\$0	\$1,232
Enrollment Status for AA:	Part-Time	Part-Time	Part-Time	
Remedial Exception:				0.0
Award Counters:	0.33	0.33	0	0.66
Award Type:	Adjusted	Processed	Cancellation	



```

FG0H I xxxxxxxxx;2012;A;;STUDENT
COMPLETE/REJECT          DEPENDENT
SSN XXX-XX-XXXX ABABU0    C STUDENT

1ST 99999997 01 PHEAA QTR UNIV
EST ALT AWD: F-N/A W-N/A S-N/A
    
```



**Why would the Alternate Award (AA) be blank?**

The Alternate Award will not display in situations where a result cannot be calculated. For example, when there is an adjustment to the actual award or the student enrollment is less than half-time.

## Application Info Tab

### Why does the number of items I see on FG59 not match the highlighted items on the Application Info tab?

Page 1 of FG59 displays Student and Parent Correctables. PHEAA identifies items as either 'Significant' or 'Insignificant'. Significant means the information is required; these are first in the FG59 list. Insignificant correctables are items where PHEAA has made an assumption and correction of that information is not required. On FG59, insignificant items display last, are separated by '\*\*/\*\*', and are preceded by this label: '(I)'. Required items are the only ones highlighted on the Application Info tab in the Partner Interface.

Example:

```
STUDENT ITEM(S) INC- (183S) 37, (401) 7, (410) 24, (438) 6
PARENT ITEM(S) INC - (014P) 14, (015F) 15, (015M) 15, (021P) 21, (023P) 23
(184P) 37, (411) 25, (412) 26 **/** (I) (020P) 20
```

## Activity Tab

### What information is on the Activity tab?

PHEAA logs all correspondence with a student or related to a student account. This is visible on the Activity tab and includes all incoming and outgoing emails, letters, and summaries of telephone conversations.

### When does my name appear under 'User' on Activity?

When you make a submission, your name will appear under the 'User' column. If the column displays 'System Update', this means the entry was from a PHEAA program.

### Will the Activity detail be enhanced to list text instead of codes?

There are no immediate plans to alter the manner by which Activity logs. Converting codes to text is a technical challenge. You may click on the Award tab and review the data.

Example Activity loggings showing housing change to code '1' – Dormitory and enrollment change to code '2' – Full-time Evening.

#### Activity Log

[Display Ac](#)

Activity Type	Description	Activity Date	Close Date	Contact Description
Miscellaneous	GRANT HOUSING CHANGE BY SCHOOL - PARTNER INTERFACE	07/16/2013	07/16/2013	To Grants
99999999 FALL - 1				
Miscellaneous	GRANT ENROLLMENT CHANGE BY SCHOOL - PARTNER INTERFACE	07/16/2013	07/16/2013	To Grants
99999999 FALL - 2				

## School Notes (Comment History) Tab

What information is on the **School Notes** tab?

School Notes, previously named 'Comment History', are comments made by a school user. They are not readily viewable by PHEAA staff and should not be confused with the student **Activity** tab.

Who can view my School Notes?

School notes are specific to each school. School Notes are not readily visible to PHEAA staff.

## Eligibility Record (History)

Where do I find the student's grant history?

This transaction is the mainframe equivalent to the FG0B transaction. In the Partner Interface, it is accessible from the individual **Student Record**. The labeling has changed through various iterations of the Interface.

It was a link...

 [View Eligibility Summary](#)

But is now a button...

[View Eligibility for Student](#)

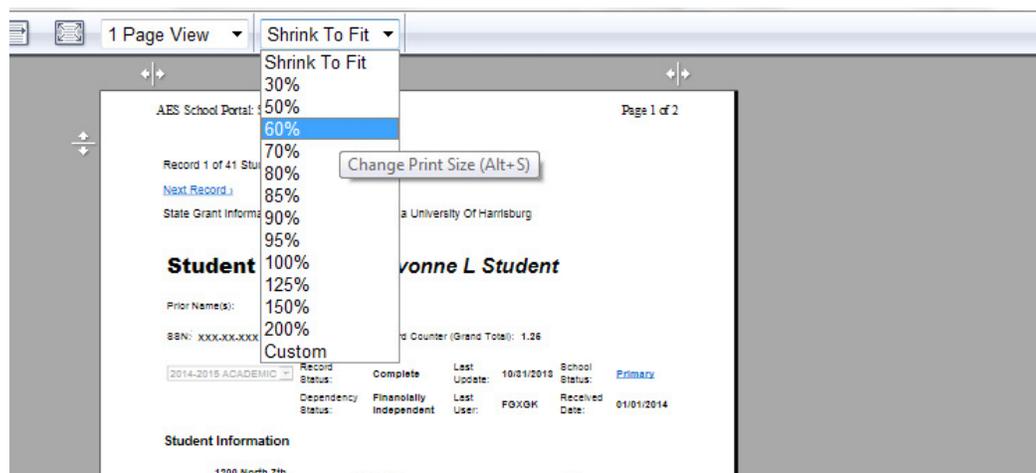
My school is not a primary choice for the current or any academic year. Why can't I access the Eligibility Summary (History)?

When a school has never been a primary choice for the student, the Eligibility Summary is not accessible. This is true of both the Partner Interface and the mainframe FG0B transaction.

## Printing

Can I print the entire record?

You can print screen information in a user-friendly format. PHEAA recommends that you choose 'Print Preview' from 'File' and adjust your percentage to around 60% to get the information on one page.



## EXPORTING TO EXCEL OR COMMA SEPARATED VALUE (CSV) FILE

### Is the award date part of the data I can print when exporting to Excel?

The award date is important crediting information. It is part of the data that exports when the Common Separated Value (CSV) format is chosen. It is not part of the Excel format. It is also part of the information listed on the student's Award Info tab and you may print that display for the student's records.

### What is the difference between data when choosing Excel versus CSV format?

Both of these open using Microsoft Excel. Choose the Excel format for full descriptions (Table 1). Choose the CSV format (Table 2) for automated processing and/or additional data.

The screenshot shows the 'State Grant Records' interface. At the top, there are dropdown menus for '2013-2014 ACADEMIC' and 'period for: 9999997 PHEAA QUARTER UNIVERSITY'. Below this is a 'Filter Records' section with a message 'No filters have been applied. Add Filters.' and an 'Export to Excel/CSV' button. A table displays '1 - 20 out of 22 Student Records'. The table has columns: Name/Address, SSN, Award Counter, Fall, Winter, Spring, and Academic Year Total. One record is visible for a student named BANDANA D.

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
STUDENT, BANDANA D 1200 NORTH 7TH STREET HARRISBURG, PA 17102	XXX-XX-XXXX	1	\$100 Full Time Student Commuter	\$1,313 Full Time Student Commuter	\$1,313 Full Time Student Commuter	\$2,726

Table 1

Excel Setting Tab; Tab with Data in English
School Code
SSN
Name
Address
Award Counter (Total)
(Fall) Award/Reject
(Fall) Enrollment Status
(Fall) Housing Status
(Fall) DE Nomination Indicator
TOTAL

Table 2

CVS file – 1 row with following columns (with codes)
SSN
Last Name
First Name
Middle Initial
Street Address
City
State
Zip Code
Academic Year Award Counter
Academic Year Total
(Fall) College Code
(Fall) Award Amount
(Fall) Reject Code
(Fall) Award/Reject Date
(Fall) Cancelation Code
(Fall) Enrollment Status
(Fall) Housing Status
(Fall) DE Nomination Indicator

# UPDATES

## Special Request

### What is a Special Request?

The Special Request button on each **Student Record** replaces FG11. It is a manual request for PHEAA staff to update an individual record. Requests are worked in date received order and normally within seven business days. Some requests may take slightly longer due to the status of the account or during high volume periods.



Since this function is manual, please **only use it when necessary**.

#### Examples of Appropriate Use:

- To retract 'Less Than 50% In-Classroom' reporting
- To report when funds have not been credited and will be returned so that PHEAA can discontinue a student refund (PHEAA Collectable)
- To request changes that cannot be processed due to a pending review by PHEAA
- To submit costs that are more than 25% greater than reported
- To report questionable eligibility on items such as EFC, Pennsylvania domicile, etc.
- To report a non-Pennsylvania address change
- To report a change to year in school (nursing schools)

#### Examples of Inappropriate Use:

- Submitting costs that are more than 25% lower than reported
- Submitting adjustments due to withdrawal
- Reporting enrollment or Pennsylvania address changes
- Reporting 'Less Than 50% In-Classroom' for additional terms

### How do I know when the Special Request has been completed?

Special Requests log as 'open' activities upon submission. 'Open' means that there is no date under the 'Close Date' column as in the below example. Once PHEAA works the request, the action date will appear under the 'Close Date' column.

**IMPORTANT:** Please help us maximize our staff's efficiency by only submitting one request. Submitting duplicate requests or submitting the same request through both Special Request function and FG11 does not expedite your request. Rather, it has the opposite effect. If you have a question or concern about a request that you have verified as logged on Activity, please contact us at **800.443.0646**, option 3, option 1.

Award Information
School Notes
Activity Log
Application Info

**Activity Log**
Display Activity for All Years

Activity Type	Description	Activity Date	Close Date	Contact Description	User
<input checked="" type="checkbox"/>	Form	SPECIAL REQUEST - DISBURSED - PARTNER INTERFACE	06/25/2013		From FAA CAROL A STAFF

This student is no longer <50% classroom for the Fall.

## Academic Progress

### How do I report lack of Academic Progress?

Report Academic Progress (to reject or remove a reject) on an individual student by choosing the 'Cancellation or Reinstatement' section.

NOTE: The 'Reinstatement' radio button only appears as an option when one of the above reasons was selected in a previous transaction.

#### Cancellation or Reinstatement

	Fall	Spring
<b>Cancellation:</b>	<input type="radio"/> Student Graduated	<input type="radio"/> Student Graduated
<b>Cancellation:</b>	<input type="radio"/> Not Enrolled	<input type="radio"/> Not Enrolled
<b>Reject :</b>	<input type="radio"/> Academic Progress Reject	<input checked="" type="radio"/> Academic Progress Reject
<b>Reinstatement:</b>		<input type="radio"/> Reinstatement

Report Academic Progress on groups of students by creating a mass update queue and choosing the 'Cancellation/ Reinstatement' type.

Period: 2013-2014 ACADEMIC    Campus: PHEAA UNIVERSITY OF HARRISBURG    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

< Previous

Continue >

### Can I report Academic Progress on incomplete records using the Interface?

Initially, Partner Interface required the status of the record to be Complete. However, that is no longer the requirement. Partner Interface allows updates for Academic Progress rejects on Incomplete records.

## Less Than 50% In-Classroom

### Can I reinstate a student after reporting less than 50% classroom?

At this time, PHEAA must continue to review these records. You may request these reinstatements through submission of a [Special Request](#).

### Can I report less than 50% classroom for the Spring term if I've already reported Fall?

Yes! This capability is now available. However, cancellations are not instantaneous. If the 30 day period for an ADA Accommodation response has passed, the Spring term will be cancelled that evening. If it has not passed, both the newly and previously reported terms will be cancelled when the date has passed.

## Credit Reporting

### What are the credit fields?

Effective with the 2013-14 academic year, PHEAA is requiring the number of attempted credits for each term online and in-classroom. Please reference the 2013-14 State Grant Certification Procedures. Separate training materials are available on [PHEAA.org/training](http://PHEAA.org/training).

## Cost Overrides (Different Educational Costs) and Adjustments

### Can I report differential costs that are more than 25% greater through the Partner Interface?

The Partner Interface **Cost Override** section will only accept figures where the costs are more than 25% lower. You may report costs that are more than 25% greater through a [Special Request](#) if the Certification Procedures for the year you are reporting indicate those differentials are acceptable.

### Why can't I see the full description of a code?

If you click on a drop down box, the code and its meaning will display. After a selection is made, the view of the entire description is truncated due to space limitations.

During selection:

After selection:

## Miscellaneous Update Questions

### Why are certain updates unavailable ('greyed out')?

There are several reasons why certain update sections would not be available.

*Time of Year* – The time of year and the academic period both play a role in whether or not an update can be submitted. For example, certain updates are not available until actual need is processed in May. The schools' ability to update records closes annually on June 30 following the academic year. Certification Procedures request that schools reconcile by June 1.

*Upfront Validation* – The Partner Interface considers that status of the student's record when determining what types of updates are available. For example, if the student's record is incomplete or ineligible, you cannot submit a cancellation since there is no award. Therefore, the Cancellation/Reinstatement section would appear grey.

### Will there be an option to indicate 'full year' instead of choosing terms separately?

Through school observations and early discussions, it was determined that a separate full year indicator would not be incorporated into the Partner Interface design.

### How do I change a student to my school?

The 'Request Primary School Change' feature has been added to the Home page of Alec. This function replaces the mainframe transaction FG5T. Please refer to the Partner Interface User Guide for steps on using this function.

The screenshot displays the Alec Partner Interface Home page. At the top, there is a search bar with the text 'SSN or Last Name' and a 'Search' button. Below the search bar is the Alec logo, which consists of a pair of glasses and the text 'Alec' above it. To the right of the logo is the tagline 'THE FINANCIAL AID KNOW-IT-ALL'. Below the logo and tagline is a navigation menu with the following items: 'Home', 'State Grants' (with a dropdown arrow), 'Loan Processing' (with a dropdown arrow), and 'Reports & Files' (with a dropdown arrow). The main content area is titled 'State Grants' and contains a grid of eight links, each with a blue arrow icon and a sub-link:

- [View State Grants Dashboard](#)  
Standard Lists and Worklists
- [View My Exports](#)  
View Exported Student Lists
- [Create Mass Update Queue](#)  
Create Mass Update Queue
- [Access State Grant & Special Programs](#)  
OC/Webconnect
- [View Weekly Update and Roster](#)  
Download from PageCenter
- [State Grant Education Costs](#)  
Education Cost Form
- [State Grant Disbursement Certification](#)  
Disbursement Certification Form
- [Request Primary School Change](#)  
Change Primary School in Student Record

## I work for a Nursing School, can I update the year in school?

Nursing schools can update Academic Level which is found in the School Information section.

	Fall	Spring
<b>Branch Campus:</b>	00820000-01 Jameson M	00820000-01 Jameson M
<b>Program of Study:</b>	L - Registered Nursing F	L - Registered Nursing F
<b>Housing Status:</b>	1 - Dormitory	1 - Dormitory
<b>Enrollment Status:</b>	1 - Full Time Student	1 - Full Time Student
<b>Academic Level:</b>	2 - Second Academic Yr	2 - Second Academic Yr
<b>&lt;50% Classroom Attendance:</b>	<input type="checkbox"/> Select if less than 50%	<input type="checkbox"/> Select if less than 50%

## What is the timing of changes?

Updates are immediate when successful unless submitted through a [Special Request](#). Updates noted as 'Successful-Pending' are those where PHEAA immediately accepts the data into the record but does not immediately recalculate the student's eligibility. This is due to a pending review by PHEAA.

## Can students see these changes in Account Access?

The Partner Interface reporting tool did not change the students' view in Account Access. Successful changes and real-time results have been and continue to be available to the students.

## How do I add a Comment ('School Note')?

Your school must be a primary school choice. You may add a comment when updating a single student record or by selecting 'Add Another Note' on the School Notes tab.

## Mass Updates

### Why can I only submit 100 records at one time?

The mass update queue limit is technical. The Partner Interface tool does not replace the existing Certification Transmission process.

If you are interested in submitting updates to PHEAA in larger quantities:

- Review the technical layouts, available in the Document Library, with your Information Technology staff
- Contact us at 800.443.0646, option 4

### What are some examples of why an update is unsuccessful?

The Partner Interface performs upfront validation on records and generally does not allow an 'Add' of a record that will fail to process. However, there are some scenarios where the result can be unsuccessful. A few examples include:

**Example 1:** The student is ineligible for Academic Progress and the school user adds the record to a 'Cancel/Reinstate' Update Type queue. The student record will be permitted to be added to the queue since Academic Progress is a valid choice. However, if the school user attempts to Cancel or Reinstate for another reason such as 'not enrolled', the record will be processed and the result will show as 'unsuccessful'.

**Example 2:** The Mass Update queue was created and not processed. For example, a student was added to the mass update queue with the intention of cancelling for 'not enrolled'. In the meantime, PHEAA staff cancelled the award for not enrolled. The Financial Aid Administrator then decides to process the queue. Because the student was already cancelled, the result will be unsuccessful.

### After a mass update queue is processed, how are the records sorted?

The records are not sorted in any particular order. You may export your results to Excel and sort to suit your needs.

### Why doesn't mass update display the total count of records processed?

This inquiry has been taken into consideration for future development enhancements. In the interim, you may export your results to Excel and retrieve counts through Excel functions.

### Why does the export to Excel place first and last name in one column?

The export was designed to place the name in one column. This may be a pain point for some users and will be taken into consideration for future development enhancements.

### Can I certify my roster through the Partner Interface?

Disbursement functions such as certifying a roster are not currently part of the Partner Interface. If you want to certify online you may do so through the online form located in the Document Library in Alec. This Document Library page is accessible from the Alec home page and drop down menu.

The screenshot shows the Alec Partner Interface dashboard. At the top, there is a search bar and navigation links for 'Your Account', 'Contact Us', and 'Logout'. The main header includes the Alec logo and the tagline 'THE FINANCIAL AID KNOW-IT-ALL'. Below the header, there is a navigation menu with 'Home', 'State Grants', 'Loan Processing', and 'Reports & Files'. The 'State Grants' menu is expanded, showing options like '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', and 'Request Primary School Change'. On the right side, there are three sections: 'Messages' (no messages), 'Alerts (Notifications)' (3 exports ready to download), and 'Order Materials' (Program Materials).

## STUDENT LISTINGS FROM DASHBOARD

### How often is the Dashboard refreshed?

Effective October 2013, the Dashboard refreshes instantly.

### Isn't the Dashboard just recent updates?

In addition to recent updates, the Dashboard also provides access to all State Grant records. Lists of students are accessible by selecting a record status or 'all'. Users may narrow lists down by adding filters. Please refer to the Partner Interface User Guide for more information.

### Are these lists the same as GPAD or GAPS reports found in the PageCenter report repository?

The Student Listings accessible from the Dashboard are not the equivalent of any State Grant reports. These reports only provide lists of students where a recent update has been made.

### Can I sort the student list on the display?

This is not a current feature. This inquiry will be taken into consideration for future development enhancements.

### When I select a student from a listing, can I toggle between years?

When users access records via the Student Listing, the academic year/period is locked down and provides the ability to cycle through all records in the list. If the user is on a student record that was accessed via the listing and wants to review the prior year, the SSN must be copied and pasted into the search field.

## MISCELLANEOUS

### How many years back can data be viewed?

The Partner Interface will display detailed student data on the tabbed information back through 2007-08. Any data prior to that will display on the **Eligibility Record** (student history; formerly FG0B).

[View Eligibility for Student](#)

### When will the FG3S disbursement display and other college-related data be added to the Interface?

PHEAA recognizes the need to convert more data to the Interface for 'one-stop shopping'. Many requirements are still on the development wish-list. Your support and continued use of the Interface will help us evaluate what enhancements take priority.

### What is the targeted time frame to remove mainframe (a.k.a. 'green screen') transactions such as FG0B, FG59, etc.?

PHEAA has not established a date to remove mainframe access. We will continue to evaluate the need for these transactions as further development of the Partner Interface occurs.

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, financial aid processing, outreach, and other student aid programs.

PHEAA's earnings are used to support its public service mission and to pay its operating costs, including administration of the 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 American Education Services (AES) and FedLoan Servicing.

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