School Portal

Ready to Succeed Scholarship Partner Interface User Guide
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Introduction

The Grants Partner Interface is a Web portal that allows school users to manage Pennsylvania State grant student records on the Web, including participants in the Distance Education program (DE) and the Ready to Succeed Scholarship (RTSS). School users can search for, view, and update individual student records; view eligibility records; submit special requests when changes cannot be made on the portal; request primary school changes; access the online Web certification; use mass update queues to update multiple student records; and access and export student listings through a state grant dashboard.

This user guide describes only the features of the Grants Partner Interface that pertain to the Ready to Succeed Scholarship. For complete instructions for using the State Grant Partner Interface for State Grants, including distance education reporting for years 2018-19 and forward, refer to user guide State Grant Partner Interface. For instructions on the Distance Education Pilot Program (DEPP) for years prior to 2018-19, refer to the user guide School Portal Distance Education Partner Interface.

Getting Started

Use the following URL to access this application: https://am.partners.aessuccess.org/partnersB2Bsso/login.htm. Refer to the Web Login and Authentication user guide for additional instructions on logging in to the application, managing your personal profile and security information, and resetting your password.
Alec School Portal

After the user completes the log in process, the Alec School Portal home page displays.

![Alec School Portal](image)

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

1. To manage Pennsylvania State Grant student records for RTSS participants, click the down arrow in the first search field and select **Search Grants**.
NOTE: The drop down list does not display for school users with access only to State Grant information. In this case, only Search Grants displays.

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

3. Click Search.
The **Search Results** page redisplay a list of accounts that match the criteria entered in the search field. This screen displays only if the school user searched by last name.

![Search Results Page]

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

4. To view a student’s account, click the **View Account** link in the **Action** column.
The **Student Record** page displays.

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

5. Click the **Ready to Succeed** tab to view Ready to Succeed Scholarship information. Refer to the [View Ready to Succeed Scholarship Information on the Student Record](#) section for more information.
View Eligibility Record

1. To view the student’s eligibility record, click the **VIEW ELIGIBILITY FOR STUDENT** link on the student record.
The **Eligibility Summary** displays.

![Eligibility Summary](image)

The **Eligibility Summary** displays a history of the student’s State Grant applications, award counters, remedial term and other eligibility information. It displays eligibility information for each term and for the academic year.

2. To view a different student record, enter an SSN or other search criteria in the search field and click the **Search** icon, or click the **Back to Search Results** link to return to the search results listing to select another student.

   The **Eligibility Summary** field displays the student’s name.

3. To return to the student record, the **VIEW STUDENT RECORD** link.
The **SSN** field displays the student’s nine-digit Social Security number.

The **ACCT#** field displays the student’s 10-digit account number.

The **SG Award Counter** (Grand Total) field displays the total of all State Grant award counters that the student has received for all years.

The **Last Update** field displays the date the student’s eligibility record was last updated.

The **Last User** field displays the ID of the user who last updated the student’s eligibility record.

4. Click the left and right arrows to scroll through the eligibility records.

The **Term Records** section displays information for the fall, winter, spring and summer terms and the academic year total, if appropriate.

The **Halftime** field displays **Yes** or **No**, indicating whether the student attendance was half-time.

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

The **Program of Study** field displays the student’s program of study.

The **SG Award/Reject** field displays the award amount or a reject reason for each term, including the summer, and a total for the academic year.

The **SG Remedial Exception** field displays the award counter for the terms during which the student took developmental credits needed to meet the State Grant minimum enrollment requirement.

The **SG Award Counters** field displays the decimal equivalent of the State Grant award for the term and a total for the academic year. For example, a part-time semester award equals .25.

The **RTSS Award/Reject** field displays the Ready to Succeed Scholarship award amount or a reject reason for each term, including the summer, and a total for the academic year.

The **RTSS Remedial Exception** field displays the award counter for the terms during which the student took developmental credits needed to meet the State Grant minimum enrollment requirement.
The **RTSS Counters** field displays the decimal equivalent of the Ready to Succeed Scholarship award for the term and a total for the academic year. For example, a part-time semester award equals .25.

The **SG Academic Level** field displays the student’s year in school for each term.

The **Cancellation Reason** field displays the reason the award was canceled.

The **Adjustment Reason** field displays the reason for the award adjustment.

The **PHEAA EFC** field displays the PHEAA-calculated Expected Family Contribution.

The **High School Graduate** field displays Yes or No, indicating whether the student met the high school graduate or equivalent requirement.

The **Period Records** section displays information for the academic year and for the summer term, if appropriate.

The **Application Filed** field displays Yes or No, indicating whether the student filed a FAFSA for the academic year or online summer application for the summer term.

The **Total Family Contribution** field displays the family’s Total Family Contribution used in calculating eligibility under the old need-analysis formula for years prior to 2006-07.

The **RTSS Academic Level** field displays the student’s year in school for each term.

The **High School Grad Year** field displays the year the student graduated from high school.

The **Veteran Status** field displays Yes or No, indicating whether the student is a veteran.

The **Financial Independent Status** field indicates whether the student is considered independent for State Grant purposes.

The **Inactivation Reason** field displays the reason the State Grant record was inactivated and further processing was discontinued.
Ready to Succeed Scholarship

The **Ready to Succeed** tab displays Ready to Succeed Scholarship information from the most recent academic year application on file or the selected academic year if a different one was selected. This tab displays when the primary school is approved to participate in the program and has updated Ready to Succeed Scholarship information (e.g. nomination, exclusion, GPA reporting, etc.) on the student record. Special messages may display important information regarding the status of the student’s record, such as RTSS Income Verification Review information and the RTSS Domicile Review status. Click the arrow to expand the box and display messages.

The **RTSS Eligibility** field displays the student’s award amount or a reject reason for the Ready to Succeed Scholarship program. If the award is pending, this field displays **Pending**.
The **GPA for Previous Academic Period** field displays the student’s grade point average for the previous academic period.

The **Current Academic Level** field displays the student’s current academic level.

The **Total Annual Household Income** field displays the student’s total annual household income.

The following fields display information for the fall, winter and spring terms:

The **Nominated for Ready to Succeed Award** field displays **Yes** if the student was nominated by the school for the Ready to Succeed award.

The **RTSS Award/Reject** field displays the student’s award amount or a reject reason for the Ready to Succeed Scholarship program. If the award is pending, this field displays **Pending**.

The **Award Type** field displays **Adjusted** if the award was adjusted or **Cancellation** if the award was canceled. Otherwise, it displays **Processed**.

The **Enrollment Status** field displays the student’s enrollment status.

The **Total College Costs** field displays the total college costs.

The **PHEAA Estimated Pell** field displays the student’s estimated PELL grant award estimated by PHEAA.

The **PHEAA EFC** field displays the student’s expected family contribution estimated by PHEAA.

The **Cancellation Reason** field displays the reason the award was canceled.

The **School Adjustment Reason** field displays the reason for the school adjustment.

The **PHEAA Adjustment Reason** field displays the reason for the PHEAA adjustment.

1. To update Ready to Succeed Scholarship information, click the down arrow next to **Select Action** and click one of the following options:
   - **Update Record**
   - **Cancellation or Reinstatement**
   - **Award Adjustments**
   - **Ready to Succeed**
**Update Record**

The **Update Record** screen displays the student’s demographic information and school information which may be updated.
The **Student Record Demographic Information** section displays the student’s address, phone number and email address.

1. In the **Address** fields, update the student’s street address in the first field, the city or town in the second field, select the state from the down arrow and update the ZIP code in the last address field.

2. In the **Phone** field, update the student’s 10-digit phone number.

3. In the **Email** field, update the student’s email address.

The following fields display in the **School Information** section for the Fall, Winter and/or Spring terms.

4. In the **Branch Campus** field, click the down arrow and select the school code and name from the drop-down list.

5. In the **Program of Study** field, click the down arrow and select the program of study from the drop-down list.

6. In the **Housing Status** field, click the down arrow and select where the student resides during school from the drop-down list.

7. In the **Enrollment Status** field, click the down arrow and select the student’s enrollment status for the term from the drop-down list.

8. In the **Enrollment Mode** field, click the down arrow and select the student’s percentage of distance or online education to classroom education from the drop-down list.

9. In the **School Notes** text box, enter any school notes for this update.

10. Click **Submit Changes** to submit the updates to the record or click cancel to not submit the changes to the demographic or school information.
Cancellation or Reinstatement

The **Cancellation or Reinstatement** section displays the fields for award cancellation and reinstatement information open for edit. If the record was previously canceled or rejected, those reasons display under the term.

**NOTE:** This section may be disabled if the latest academic year is not accessible because PHEAA has not made State Grant eligibility announcements to students, which generally occurs in May, or if the record being adjusted does not have an award to cancel or reinstate. For example, the record is in an incomplete status.

The **State Grants** tab initially displays under the **Cancellation or Reinstatement** section.

1. Click the **Ready to Succeed** tab.
The **Cancellation or Reinstatement** page displays the **Ready to Succeed** tab.

2. In the **Cancellation – Student Graduated** field, check each term to which the cancellation should apply if the cancellation is because the student graduated.

3. In the **Cancellation – Not Enrolled** field, check each term to which the cancellation should apply if the cancellation is because the student is not enrolled.

4. Check **Reject – Academic Progress Reject for Academic Period** if the student failed to make satisfactory academic progress for the Ready to Succeed Scholarship program as of the time the school determines eligibility. Refer to the program guidelines on the PHEAA Web site for more information.

5. In the **Reinstatement** field check the term to which the reinstatement should apply. This field displays only if the term was previously canceled or rejected.

   **NOTE:** Students whose awards are canceled or rejected are not guaranteed to be reinstated in full or in part.

6. In the **School Notes** field, enter comments regarding the update, if necessary. Click **View Previous Comments** to view comments entered for previous updates. A pop-up box displays. This field is used by the school for informational purposes only and will not be reviewed by PHEAA staff.
7. Click **Submit Changes** to submit the updates made to the **Cancellation or Reinstatement** section, or click **Cancel** to close the **Cancellation or Reinstatement** section without submitting the updates.
Award Adjustments

The **Adjustment Amount** section displays award adjustment information. If the record was previously adjusted, those reasons will display under the term.

**NOTE:** This section may be disabled if the latest academic year is not accessible because PHEAA is not ready to accept adjustments or if the record being adjusted does not have an award to adjust. For example, the record is in an incomplete status or the term is ineligible.

1. In the **State Grant Adjustment** field, enter the adjusted award amount. Only an amount that is lower than the current amount may be entered. If an adjustment is made to the **State Grant Adjustment** field, an adjustment is required in the **Ready to Succeed Adjustment** field.

2. In the **Ready to Succeed Adjustment** field, enter the adjusted award amount. Only an amount that is lower than the current amount may be entered. If an adjustment is made to the **Ready to Succeed Adjustment** field, an adjustment is required in the **State Grant Adjustment** field.

**NOTE:** To enter an award in the **State Grant Adjustment** field or the **Ready to Succeed Adjustment** field that is higher than the current award but lower than the original PHEAA-calculated award, first remove the adjustment then apply the higher award. For example, if the Current Award calculated by PHEAA is $1,000 and an adjustment is made to lower the award to $800 when it should have been $850, make two adjustments. First, remove the $800 adjustment, then submit the $850 adjustment.
3. Click the down arrow in the **Select Reason** field and select a reason for the adjustment from the drop-down list.

The **Current State Grant Award** field displays the student’s current State Grant award for each term.

The **Current Ready to Succeed Award** field displays the student’s current Ready to Succeed Scholarship award for each term.

4. Check **Remove Adjustments** to remove the adjustment. This is unprotected only when an adjustment was made for a previous update.

5. In the **School Notes** field, enter comments regarding the update, if necessary. Click **View Previous Comments** to view comments entered for previous updates. A pop-up box displays. This field is used by the school for informational purposes only. This field is used by the school for informational purposes only and will not be reviewed by PHEAA staff.

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


### Ready to Succeed

The **Ready to Succeed Scholarship** updates display on two tabs: **Update & Nominate** and **Exclude from Program**.

**NOTE:** This section may be disabled after a nomination has been processed by PHEAA.

1. Check **Certify Record** to certify the student for the Ready to Succeed Scholarship, or click **Record is Certified**, not shown, to remove certification of the Ready to Succeed Scholarship.

Refer to the following sections for more information:
- [Update and Nominate for Ready to Succeed Scholarship Program](#)
- [Exclude from Ready to Succeed Scholarship Program](#)
Update and Nominate for Ready to Succeed Scholarship Program

Use the **Update & Nominate** tab to nominate the student for the Ready to Succeed Scholarship program.

1. In the **Previous Period GPA** field, enter the previous grade point average for the student candidate. Refer to the RTSS program guidelines on the PHEAA Web site for more information.

2. Click the down arrow in the **Period Academic Level** field and select an academic level for the current period. Refer to the RTSS program guidelines on the PHEAA Web site for more information.

3. In the **Nominate for Ready to Succeed Scholarship** field, check **Nominate** for each term for which the student qualifies and will be nominated for the scholarship. Check **Remove Nomination** to remove nomination for a student that has already been nominated.
4. In the **School Notes** field, enter comments regarding the update, if necessary. Click **View Previous Comments** to view comments entered for previous updates. This field is used by the school for informational purposes only and will not be reviewed by PHEAA staff.

5. Click **Submit Changes** to submit the updates made to the **Ready to Succeed Scholarship** section, or click **Cancel** to close the **Ready to Succeed Scholarship** section without submitting the updates.
Exclude from Ready to Succeed Scholarship Program

Use the Exclude from Program tab to exclude the student from the Ready to Succeed Scholarship program for the award year.

1. Check Remove Exclude to remove the student’s exclusion from the Ready to Succeed Scholarship program.

2. In the School Notes field, enter comments regarding the update, if necessary. Click View Previous Comments to view comments entered for previous updates. This field is used by the school for informational purposes only and will not be reviewed by PHEAA staff.

3. Click Submit Changes to submit the updates made to the Ready to Succeed Scholarship section, or click Cancel to close the Ready to Succeed Scholarship section without submitting the updates.
View Ready to Succeed Student Lists on the State Grant Dashboard

School users can use the **State Grants Dashboard** to access, filter and export student record lists; review recent updates; process records individually; certify reconciliation rosters; and select students to add to a mass update queue.

1. Click **View State Grant Dashboard** on the **Home** page or select it from the **State Grants** drop-down list.
The **State Grants Dashboard** displays.
2. To view a summary for a different academic year, click the down arrow in the academic year field to select a new academic year to display.

3. To view a summary for a different branch, click the down arrow in the school field to select a new branch.

4. Click the Ready to Succeed tab.

For more information about the State Grants Dashboard, refer to user guide *School Portal State Grant Partner Interface*. 
The **Ready to Succeed** tab displays.

Refer to the following sections for more information:
- [Review and Certify Reconciliation Rosters](#)
- [Report Ready to Succeed Required Information](#)
- [Process Ready to Succeed Awards](#)
- [Review Refunds for Ready To Succeed Awards](#)
NOTE: Process Ready to Succeed Mass Update, View Disbursements and View Refunds are described in later sections of this guide.
Review and Certify Reconciliation Rosters

The **Reconciliation Rosters** section displays reconciliation roster information for the academic year or summer term. The top of this section displays the indicator **Yes** or **No** if a clean roster is needed. This section also displays one or two reconciliation rosters cards with the status, disbursement amount, paid on date and the disbursement roster date. The roster cards are sorted by newest to oldest. Click the **Load More** button to load additional reconciliation roster cards.
1. If the status of the reconciliation roster is **Incomplete** and the term has already begun, click the **Certify Roster** button to certify the reconciliation roster.
The **Certification Statement** dialog box displays.

![Certification Statement Dialog Box]

2. Review the certification statement.

3. Click the **Certify** button to certify the roster. Click the **Cancel** button to not certify the roster.
In this example, the **Ready to Succeed** tab redispays with the message **ACADEMIC YEAR RECONCILIATION** has been marked complete.

The **Clean Roster Needed?** field is updated to **No** to indicate that a clean disbursement roster is not required.

The reconciliation disbursement status is updated to **Completed**.

The Disbursement Amount and the Disbursement Roster Date Certified on date display for the updated disbursement roster.

**NOTE:** An institution activity record is added to capture the year/period, type of roster, date and time of the certification, and the user ID of the person who certified the roster. School users can view the school activity on the **STATE GRANT AND SPECIAL PROGRAMS ACTIVITY** screen using transaction FC5S through OC/Webconnect.
Report Ready to Succeed Required Information

The **Report Ready to Succeed Required Info** section displays the lists of students who have met the income requirement for the Ready to Succeed Scholarship program.
1. Click the link in the **All** column to view a Ready to Succeed Student List for the academic year.

Refer to the following sections for more information:
- Student Candidates (PHEAA Screened)
- Excluded Records
- Needs Academic Level
- Needs GPA
- Reporting Complete
Student Candidates (PHEAA Screened)

The **Student Candidates – Ready to Succeed** screen displays a list of students who have been screened by PHEAA for reportedly having met the income requirement and are determined to be candidates for the Ready to Succeed Scholarship program.

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

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

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

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

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

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

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

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

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

2. Click **Export to Excel/CSV** to export the student list. Refer to user guide [School Portal State Grant Partner Interface](#) for more information about exporting the student list.

3. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to [View Ready to Succeed Scholarship Information on the Student Record](#) for more information.

4. To select one or more records to add to a new mass update queue, check the boxes to the left of the **Name/SSN** field. To select all records on the page, check the box in the header.

   **NOTE:** A maximum of 100 records may be added to the mass update queue. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records. In some cases, a record cannot be updated by a school user. It cannot be checked even if the school user checks the box in the header to select all records.
5. Click **Add to Mass Update** to add the selected record(s) to a new mass update queue. Refer to [Create Ready to Succeed Mass Update Queue](#) for step-by-step instructions.

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

The Excluded Records – Ready to Succeed screen displays a list of students who have been excluded from the Ready to Succeed Scholarship program for the award year.

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

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

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

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

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

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

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

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

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

2. Click **Export to Excel/CSV** to export the student list. Refer to user guide [School Portal State Grant Partner Interface](#) for more information about exporting the student list.

3. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to [View Ready to Succeed Scholarship Information on the Student Record](#) for more information.

4. To select one or more records to add to a new mass update queue, check the boxes to the left of the **Name/SSN** field. To select all records on the page, check the box in the header.

   **NOTE:** A maximum of 100 records may be added to the mass update queue. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records. In some cases, a record cannot be updated by a school user. It cannot be checked even if the school user checks the box in the header to select all records.
5. Click **Add to Mass Update** to add the selected record(s) to a new mass update queue. Refer to [Create Ready to Succeed Mass Update Queue](#) for step-by-step instructions.

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

The **Report Academic Level – Ready** to Succeed screen displays a list of students whose qualifying grade point average has been reported but whose academic level is missing.

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

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

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

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

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

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

1. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.

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

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

2. Click **Export to Excel/CSV** to export the student list. Refer to user guide School Portal State Grant Partner Interface for more information about exporting the student list.

3. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.
4. To select one or more records to add to a new mass update queue, check the boxes to the left of the **Name/SSN** field. To select all records on the page, check the box in the header.

**NOTE:** A maximum of 100 records may be added to the mass update queue. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records. In some cases, a record cannot be updated by a school user. It cannot be checked even if the school user checks the box in the header to select all records.

5. Click **Add to Mass Update** to add the selected record(s) to a new mass update queue. Refer to [Create Ready to Succeed Mass Update Queue](#) for step-by-step instructions.

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

The **Report GPA – Ready to Succeed** screen displays a list of students whose academic level has been reported but whose grade point average is missing.

![Image of Report GPA - Ready to Succeed screen](image)

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

1. Click the down arrow in the **Period Academic Level** field and select an academic level from the drop-down list.
2. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.
The **Report GPA – Ready to Succeed** page is updated to display only the records that match the filter options.

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

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

**NOTE:** By default, the records are sorted in alphabetical order by last name, then first name. School users can click SSN in the header to sort records by SSN.
The **Prior State Grants** field displays a counter of prior State Grant awards. It is the total number of terms for all years for which the student received a State Grant award, not including the selected academic year.

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

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

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

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

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

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

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

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

6. To select one or more records to add to a new mass update queue, check the boxes to the left of the **Name/SSN** field. To select all records on the page, check the box in the header.

   **NOTE:** A maximum of 100 records may be added to the mass update queue. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records. In some cases, a record cannot be updated by a school user. It cannot be checked even if the school user checks the box in the header to select all records.

7. Click **Add to Mass Update** to add the selected record(s) to a new mass update queue. Refer to [Create Ready to Succeed Mass Update Queue](#) for step-by-step instructions.

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

The **Reporting Complete – Ready to Succeed** screen displays a list of students who meet the requirements for the Ready to Succeed Scholarship and the reporting information is completed.

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

1. Click the down arrow in the **Period Academic Level** field and select an academic level from the drop-down list.

2. Click the down arrow in the **Previous Period GPA** field and select an academic level from the drop-down list.
3. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.
The **Reporting Complete – Ready to Succeed** page is updated to display only the records that match the filter options.

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

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

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

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

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

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

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

4. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.

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

Additional options display to export and view student records.

5. Click **Export to Excel/CSV** to export the student list. Refer to user guide School Portal State Grant Partner Interface for more information about exporting the student list.

6. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.
NOTE: Students on this list cannot be added to a mass update queue to be updated. To change a student record, school users must update records individually. Refer to Update Ready to Succeed Scholarship Information on the Student Record for step-by-step instructions.
Process Ready to Succeed Awards

The Process Ready to Succeed Award section of the Ready to Succeed tab displays candidate lists for students who have met the preliminary criteria for the Ready to Succeed Scholarship program.
1. Click the link in the desired term to view a Ready to Succeed Student List for the selected term, or click the link in the All column to view a Ready to Succeed Student List for the academic year. In the following examples, the spring term is selected if available.

Refer to the following sections for more information:
- Not Nominated (Qualifying GPA and Academic Level)
- Nominated (Pending Eligibility)
- Awarded - Needs Certification
- Awarded – Certified
- Rejects – Ready to Succeed Funds Depleted
- Rejects – All Other Reject Types
- Nominated Students Total
Not Nominated (Qualifying GPA and Academic Level)

The Nominate Records – Ready to Succeed screen displays a list of students who have a qualifying GPA and academic level but who have not been nominated for the Ready to Succeed Scholarship Program.

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

1. Click the down arrow in the Period Academic Level and select an academic level from the drop-down list.

2. Click Apply Filters to apply the selected filters to the student list, or click Reset Filters to reset the filters to begin again.
The **Nominate Records – Ready to Succeed** screen is updated to display only the records that match the filter options.

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

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

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

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

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

The **Prior RTSS Grants** field displays a counter of prior Ready to Succeed Scholarship Grant awards. It is the total number of terms for all years for which the student received a Ready to Succeed Scholarship Grant award, not including the selected academic year.
The **Remedial SG Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

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

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

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

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

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

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

4. Click **Export to Excel/CSV** to export the student list. Refer to user guide *School Portal State Grant Partner Interface* for more information about exporting the student list.
5. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.

6. To select one or more records to add to a new mass update queue, check the boxes to the left of the **Name/SSN** field. To select all records on the page, check the box in the header.

   **NOTE:** A maximum of 100 records may be added to the mass update queue. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records. In some cases, a record cannot be updated by a school user. It cannot be checked even if the school user checks the box in the header to select all records.

7. Click **Add to Mass Update** to add the selected record(s) to a new mass update queue. Refer to Create Ready to Succeed Mass Update Queue for step-by-step instructions.

   **NOTE:** Selected student records are automatically added to the new queue. The academic year from the student list is not saved to the new queue.
Nominated (Pending Eligibility)

The **Nominated Records – Ready to Succeed** screen displays a list of students who have been nominated for the Ready to Succeed Scholarship Program and whose eligibility is pending.

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

1. Check **Period Academic Level** to filter the student list to display students with the same academic level.

2. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.
The Nominated Records – Ready to Succeed screen is updated to display only the records that match the filter options.

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

The Name field displays the student’s name.

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

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

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

The Prior RTSS Grants field displays a counter of prior Ready to Succeed Scholarship Grant awards. It is the total number of terms for all years for which the student received a Ready to Succeed Scholarship Grant award, not including the selected academic year.
The **Remedial SG Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

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

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

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

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

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

Additional options display to export and view student records.

4. Click **Export to Excel/CSV** to export the student list. Refer to user guide [School Portal State Grant Partner Interface](#) for more information about exporting the student list.
5. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to the View Ready to Succeed Scholarship Information on the Student Record section for more information.

**NOTE:** Students on this list cannot be added to a mass update queue to be updated. To change a student record, school users must update records individually. Refer to the Update Ready to Succeed Scholarship Information on the Student Record for step-by-step instructions.
Awarded - Needs Certification

The Certify Records – Ready to Succeed page displays a list of students who have been awarded a Ready to Succeed award and who must be certified by the school.

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

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

1. Click the down arrow in the Period Academic Level and select an academic level from the drop-down list.

2. Click Apply Filters to apply the selected filters to the student list, or click Reset Filters to reset the filters to begin again.
The **Certify Records – Ready to Succeed** page is updated to display only the records that match the filter options.

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

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

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

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

The **Prior RTSS Grants** field displays a counter of prior Ready to Succeed Scholarship Grant awards. It is the total number of terms for all years for which the student received a Ready to Succeed Scholarship Grant award, not including the selected academic year.
The **Remedial SG Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

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

3. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.

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

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

4. Click **Export to Excel/CSV** to export the student list. Refer to user guide School Portal State Grant Partner Interface for more information about exporting the student list.

5. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to the View Ready to Succeed Scholarship Information on the Student Record section for more information.

6. To select one or more records to certify, check the boxes to the left of the **Name/SSN** field. To select all records on the page, check the box in the header.
NOTE: There is no maximum to the number of records that may be certified. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records.

7. Click **Certify Records** to certify selected records.
The Certify Records dialog box displays.

8. Click Certify to certify the records, or click Cancel to close the Certify Records dialog box and return to the Awarded - Needs Certification student list.
The **Certify Records – Ready to Succeed** screen redisplay with the following message:
Records were successfully Certified.
Awarded – Certified

The **Certified Records – Ready to Succeed** page displays a list of students who have been awarded and certified for a Ready to Succeed award.

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

1. Click the down arrow in the **Period Academic Level** and select an academic level from the drop-down list.

2. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.
The **Certified Records – Ready to Succeed** page is updated to display only the records that match the filter options.

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

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

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

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

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

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

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

3. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.

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

Additional options display to export and view student records.

4. Click **Export to Excel/CSV** to export the student list. Refer to the user guide School Portal State Grant Partner Interface for more information about exporting the student list.

5. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.
NOTE: Once certified, student records cannot be added to a mass update queue to have certification removed. To remove certification from a student record, school users must update records individually. Refer to the Update Ready to Succeed Scholarship Information on the Student Record section for step-by-step instructions.
Rejects – Ready to Succeed Funds Depleted

The **Funds Depleted Records – RTSS** screen displays a list of students who have been denied a Ready to Succeed award because program funds are depleted.

![Funds Depleted Records - RTSS Screen](image)

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

1. Click the down arrow in the **Period Academic Level** field and select an academic level from the drop-down list.

2. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.
The **Funds Depleted Records – Ready to Succeed** student list is updated to display only the records that match the filter options.

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

![Image of Funds Depleted Records - RTSS interface](image)

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

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

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

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

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

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

The **Total** field displays the reject code for the Ready to Succeed award.

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

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

Additional options display to export and view student records.

4. Click **Export to Excel/CSV** to export the student list. Refer to the user guide *School Portal State Grant Partner Interface* for more information about exporting the student list.

5. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to [View Ready to Succeed Scholarship Information on the Student Record](#) for more information.
NOTE: Students on this list cannot be added to a mass update queue to be updated. To change a student record, school users must update records individually. Refer to the Update Ready to Succeed Scholarship Information on the Student Record section for step-by-step instructions.
Rejects – All Other Reject Types

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

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

1. Click the down arrow in the **Rejects Types** field and select a reason for the reject.

2. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.
The **Reject Records – Ready to Succeed** screen is updated to display only the records that match the filter options.

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

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

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

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

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

The **Prior RTSS Grants** field displays a counter of prior Ready to Succeed Scholarship Grant awards. It is the total number of terms for all years for which the student received a Ready to Succeed Scholarship Grant award, not including the selected academic year.
The **Remedial SG Total** field displays a counter of prior State Grant awards where a remedial exception was applied. It is the total number of terms for all years, including the current period, for which the student received a State Grant award.

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

The **Total** field displays the reject code(s) for the Ready to Succeed award(s).

3. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to **View Ready to Succeed Scholarship Information on the Student Record** for more information.

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

Additional options display to export and view student records.

4. Click **Export to Excel/CSV** to export the student list. Refer to user guide **School Portal State Grant Partner Interface** for more information about exporting the student list.

5. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to **View Ready to Succeed Scholarship Information on the Student Record** for more information.

   **NOTE:** Students on this list cannot be added to a mass update queue to be updated. To change a student record, school users must update records individually. Refer to **Update Ready to Succeed Scholarship Information on the Student Record** for step-by-step instructions.
Nominated Students Total

The State Grant Records – Ready to Succeed screen displays a list of all students who have been nominated for the Ready to Succeed Program.

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

1. Click the down arrow in the Period Academic Level and select an academic level from the drop-down list.

2. Click Apply Filters to apply the selected filters to the student list, or click Reset Filters to reset the filters to begin again.
The **State Grant Records – Ready to Succeed** screen is updated to display only the records that match the filter options.

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

![Screenshot of State Grant Records](image)

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

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

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

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

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

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

The **RTSS GPA** field displays the student’s grade point average as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

The **RTSS Acad Level** field displays the student’s academic level as reported by the school according to the Ready to Succeed Scholarship program guidelines, which can be found on the PHEAA Web site.

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

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

The **Totals** field displays the total award amount for the Ready to Succeed Scholarship program for all awarded terms.

3. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to **View Ready to Succeed Scholarship Information on the Student Record** for more information.

**NOTE:** The academic year and period selected cannot be updated when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.
Additional options display to export and view student records.

4. Click **Export to Excel/CSV** to export the student list. Refer to user guide *School Portal State Grant Partner Interface* for more information about exporting the student list.

5. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to the View Ready to Succeed Scholarship Information on the Student Record section for more information.

**NOTE:** Students on this list cannot be added to a mass update queue to be updated. To change a student record, school users must update records individually. Refer to Update Ready to Succeed Scholarship Information on the Student Record for step-by-step instructions.
Review Refunds for Ready to Succeed Awards

The **Review Refunds for Ready to Succeed Awards** section of the **Ready to Succeed** tab displays records that were identified as a “PHEAA Refund Outstanding” as of the date the last disbursement roster was generated.
1. Click the link in the desired term to view a Ready to Succeed Student List for the selected term, or click the link in the All column to view a Ready to Succeed Student List for the academic year.

Refer to the following sections for more information:
- Refunds Needed
- Refunds Total
Refunds Needed

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

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

![Refund Awards - Ready to Succeed screenshot](image)

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

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

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

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

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

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

1. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.

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

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

2. Click Export to Excel/CSV to export the student list. Refer to Appendix - Export Mass Update Reports to Excel for more information about exporting the student list.

3. Click Go to First Record to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.

4. To select one or more records to add to a refunds group, check the boxes to the left of the Name field. To select all records on the page, check the box in the header.

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

5. Click Add to Refunds Group to add the selected record(s) to a refunds group, or invoice.
The **Refund Awards for These Records** dialog box displays.

![Refund Awards for These Records dialog box](image)

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

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

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

7. Click **Add to Refund Group** to add the records to the refund group, or invoice, or click **Cancel** to close the **Refund Awards for These Records** dialog box and return to the **Refund Awards – Ready to Succeed** student list.
The **Refund Awards – Ready To Succeed** screen redisplayed with the following message: *(X)* records were successfully added to Refund Group.

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

Refer to [View Refunds](#) for more information about the Refund Groups.
Refunds Total

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

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

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

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

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

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

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

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

**NOTE:** The **Amount** field, not shown, displays the outstanding refund amount of the selected term if the school user selected a term.
1. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.

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

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

2. Click **Export to Excel/CSV** to export the student list. Refer to Appendix - Export Mass Update Reports to Excel for more information about exporting the student list.

3. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.

4. To select one or more records to add to a refunds group, check the boxes to the left of the **Name** field. To select all records on the page, check the box in the header.

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

5. Click **Add to Refunds Group** to add the selected record(s) to a refunds group, or invoice.
The **Refunds for These Records** dialog box displays.

![Refund Awards - Ready to Succeed](image)

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

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

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

7. Click **Add to Refund Group** to add the records to the refund group, or invoice, or click **Cancel** to close the **Refund Awards for These Records** dialog box and return to the **Refund Awards – Ready to Succeed** student list.
The **Refund Awards – Ready to Succeed** screen redisplayed with the following message: 

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

Refer to [View Refunds](#) for more information about the Refund Groups.
Process Ready to Succeed Mass Update

One of the Ready to Succeed tab features includes the ability for school users to create and process mass update requests.

1. Click Create Mass Update or click the Edit, Process or Delete links to create a new mass update queue or to edit, process or delete a draft.
Refer to the following sections for step-by-step instructions:

- Create Ready to Succeed Mass Update Queue
- Edit Ready to Succeed Mass Update Queue
- Process Ready to Succeed Mass Update Queue
- Delete Ready to Succeed Mass Update Queue
Create Ready to Succeed Mass Update Queue

Ready to Succeed queues are used to update student records with Ready to Succeed Scholarship program information.

The **Period** field allows the user to select the period for the mass update.

1. In the **Branch for Students to be Updated** field, select the appropriate branch campus. This field only displays if the user has access to update records for more than one branch campus.

2. In the **Term(s)** field, check one or more terms related to the mass update request.

3. In the **Update Type** field, click **Ready to Succeed Updates**.

4. Click the **Continue** button.
NOTE: For instructions on creating a mass update queue to update, cancel or reinstate student records, refer to user guide *School Portal State Grant Partner Interface.*
The Step 2 of 4 – Add Students to Your Mass Updates Queue page displays.

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

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

5. In the text box, enter Social Security Numbers (SSNs) for each record that should be updated, up to 100 records. The SSN must be numeric. It may contain dashes. Use commas, spaces, returns or tabs to separate more than one SSN.

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

![Web Product Procedure Image]

7. To remove records, check one or more boxes to the left of the student record and click **Remove**.

8. Click **Continue**. To delete the queue, click **Delete Queue**.

   **NOTE:** If the school user clicks **Delete Queue**, the **Delete Queue** dialog box displays, not shown. Click **Yes, Delete Queue** to confirm the deletion.
The **Step 3 of 4 – Choose the Updates for Your Queue** page displays.

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

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

**Exclude Records for Ready to Succeed**

9. Check **Exclude Records** to exclude the student(s) in the queue for the Ready to Succeed award. This is a required field if excluding student(s).

10. Click the **Update Period Academic Level** tab to update additional fields.
11. Click the down arrow in the **Period Academic Level** field and select an academic level from the drop-down list.

12. Click the **Update Previous Period GPA** tab to update additional fields.
13. In the **Period GPA** field, enter the student(s) GPA.

14. Click the **Nominate for Ready to Succeed** tab to update additional fields.
Nominate for Ready to Succeed

15. Check **Nominate for Ready to Succeed** to nominate the student(s) for the Ready to Succeed Scholarship program.

16. Click **Previous** to return to step two, or click **Continue**. Click **Clear** to clear the information on the page to begin again.
The Step 4 of 4 – Review Your Mass Update Queue page displays.

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

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

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

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

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

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

20. Click Delete Queue to delete the queue.

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

21. Click Export to Excel to export the update criteria to an Excel spreadsheet. Refer to Appendix - Export Mass Update Reports to Excel for more information.
22. Click **Run Mass Update** to run the update.
The results page displays when the school user clicks **Run Mass Update** on the previous page.

**WARNING:** If the school user leaves this page, they will not be able to return to view the results.

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

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

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

23. Click **Export to Excel** to export the mass update report to an Excel spreadsheet. Refer to **Appendix - Export Mass Update Reports to Excel** for more information.

24. Click **Create Another Mass Update** to create another mass update queue using the instructions in this section.
Edit Ready to Succeed Mass Update Queue

School users can edit mass update queues from the Ready to Succeed Dashboard when a mass update queue was created but not run.

1. Under the Process Ready To Succeed Mass Update section, click Edit to update the mass update queue.
The **Step 2 of 4 – Add Students to Your Mass Updates Queue** page displays.

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

School users can process mass update queues from the Ready to Succeed Dashboard when a mass update queue was created but not run.

1. Under the **Process Ready To Succeed Mass Update** section, click **Process** to process the mass update queue.
The **Step 3 of 4 – Choose the Updates for Your Queue** page displays.

![Web Product Procedure](image)

Process, or run, the mass update queue using the instructions in the [Create Ready to Succeed Mass Update Queue](#) section.
Delete Ready to Succeed Mass Update Queue

School users can delete mass update queues from the Ready to Succeed Dashboard when a mass update queue was created but not run.

1. Under the **Process Ready To Succeed Mass Update** section, click **Delete** to delete the mass update queue.
The **Delete Queue** dialog box displays.

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

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

1. Click to expand the Disbursement Summary information to display the following fields:
   - **Total Awards**: Total awards disbursed
   - **Actual Disbursed Amount**: Actual amount of Ready to Succeed awards disbursed
   - **Total College Refund**: Total amount of college refund cards for the year or period, not including the program review refund amounts
   - **Total Program Review Refund**: Total amount of all program review cards for the year or period
   - **Net Balance Due to PHEAA**: Total disbursement amount due to be returned to PHEAA
   - **Net Balance Due to Institution**: Total disbursement amount due to the institution/school

2. Click one of the previous disbursement rosters, if available, or click View All Previous Disbursements to view a list of all disbursement rosters.
If the **View All Previous Disbursements** link is clicked, the **Previous Disbursements** page displays.

![Previous Disbursements Table]

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

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

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

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

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

1. Select the academic period from the down arrow to filter the disbursement list for a specific period.
2. Select a specific school from the down arrow if desired to filter the disbursement list for a specific school.
3. Click the link in the **Name** field to view the disbursement roster.
The PDF of the **RTSS Disbursement Roster** displays.

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

<table>
<thead>
<tr>
<th>STUDENT IDENTIFICATION</th>
<th>FALL TERM</th>
<th>WINTER TERM</th>
<th>SPRING TERM</th>
<th>TOTAL GRANT</th>
<th>DUE STUDENT</th>
<th>PHEAA REFUND OUTSTANDING</th>
<th>REQUESTS RECEIVED</th>
</tr>
</thead>
<tbody>
<tr>
<td>000-00-0003 STUDENT</td>
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<td>$1,000</td>
<td>$2,000</td>
<td>$0</td>
<td>NONE</td>
<td>NONE</td>
<td>NONE</td>
</tr>
<tr>
<td>STUDENT</td>
<td>RTSS PRIOR GRANTS - 1.0</td>
<td>RTSS REMEDIAL EXCEPTION - 0.0</td>
<td>RTSS ACADEMIC LEVEL - 3</td>
<td>RTSS GPA - 3.02</td>
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</tr>
<tr>
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<td>RTSS REMEDIAL EXCEPTION - 0.0</td>
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<tr>
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<td>RTSS PRIOR GRANTS - 0.0</td>
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<td>RTSS GPA - 3.27</td>
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<td></td>
</tr>
</tbody>
</table>
View Refunds

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

1. Click one of the previous refund groups, if available, or click View All Refund Groups to view a list of all refund groups.
The **Refunds for Ready to Succeed** screen displays.

![Refunds for Ready to Succeed](image)

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

2. Select the academic period from the down arrow to filter the refunds list for a specific period.

3. Select a specific school from the down arrow if desired to filter the refunds list for a specific school.

4. Click the link in the refund group **Name** field.

Refer to the following sections for more information about the refund groups:

- [Refunds – Pending](#)
- [Refunds – Received](#)
- [Refunds – Changed](#)
- [Refunds – Under Review](#)
- [Refunds – Processed](#)
Refunds – Pending

The **Refunds - Pending** status indicates that a refund group has been created and is pending receipt of the refund.

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

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

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

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

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

3. To remove a student record from the refund, click **REMOVE**.

4. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.
NOTE: The academic year and period selected cannot be updated when accessing a student from a list. To access different years for the same student, use the Search field at the top of the State Grant Portal.

5. Click Export to Excel/CSV to export the student list. Refer to Appendix - Export Mass Update Reports to Excel for more information about exporting the refund group.

6. Click Go to First Record to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.
Refunds – Received

The Refunds - Received status indicates that a refund group has been created and the corresponding refund amount has been received but has not been processed by PHEAA Financial Management.

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

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

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

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

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

3. To remove a student record from the refund, click REMOVE.

4. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.
**NOTE:** The academic year and period selected cannot be updated when accessing a student from a list. To access different years for the same student, use the **Search** field at the top of the State Grant Portal.

5. Click **Export to Excel/CSV** to export the student list. Refer to [Appendix - Export Mass Update Reports to Excel](#) for more information about exporting the refund group.

6. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to [View Ready to Succeed Scholarship Information on the Student Record](#) for more information.
Refunds – Changed

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

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

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

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

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

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

   **WARNING:** There is no confirmation. The refund group is deleted immediately.
2. To change the date the school will send the refund, change the date in the **School will send funds on or about** field and click **Apply**.

3. Click **Apply New Refunds Total** to update the new refunds totals.

4. To remove a student record from the refund, click **REMOVE**.

5. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to **View Ready to Succeed Scholarship Information on the Student Record** for more information.

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

6. Click **Export to Excel/CSV** to export the student list. Refer to **Appendix - Export Mass Update Reports to Excel** for more information about exporting the refund group.

7. Click **Go to First Record** to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to **View Ready to Succeed Scholarship Information on the Student Record** for more information.
The **Refunds – Under Review** status indicates that funds have been received by PHEAA Financial Management and the funds received amount does not equal the Refunds Total listed on the active invoice.

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

![Refunds Interface Image]

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

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

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

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

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

   **WARNING:** There is no confirmation. The refund group is deleted immediately.
2. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.

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

3. Click Export to Excel/CSV to export the student list. Refer to Appendix - Export Mass Update Reports to Excel for more information about exporting the refund group.

4. Click Go to First Record to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to View Ready to Succeed Scholarship Information on the Student Record for more information.
### Refunds – Processed

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

**NOTE:** Processed refunds display on a PDF.

<table>
<thead>
<tr>
<th>STUDENT NAME</th>
<th>SSN</th>
<th>FALL TERM</th>
<th>WINTER TERM</th>
<th>SPRING TERM</th>
<th>TOTAL REFUND</th>
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<td>$440</td>
<td>$0</td>
<td>$0</td>
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Access Disbursement Certification

Previously, schools users accessed the **Disbursement Certification** form from the Home page or from the **State Grant** drop-down list. This process is described for schools that may have certified their disbursements using this method.

1. Click **State Grant Disbursement Certification** on the **Home** page or the **State Grant** home drop-down list.
The AES Document Library opens to the Certification Procedures, Workshop Materials and Roster Certification page.

2. Click XXXX-XX State Grant Disbursement Roster Certification Page. XXXX-XX indicates the academic year.
In this example, the 2021-2022 DISBURSEMENT CERTIFICATION form displays.

3. In the OE Code field, enter the six- or eight-digit school ID assigned by the Department of Education.

4. In the School Information fields, enter the name, address and phone number of the school’s financial aid office.

5. Click the down arrow in the Certification Period field and select Academic Year Reconciliation RTSS from the drop-down list.

6. Click the down arrows in the Date of Rosters field and select the month, day and year of the disbursement roster.
7. In the Name/Title field, enter the name and title of the financial aid administrator or other school official who completed the Disbursement Certification form.

8. Click the down arrows in the Date field and select the month, day and year that the Disbursement Certification form was completed.

9. In the E-Mail Address of School Official field, enter the email address of the financial aid administrator or other school official who completed the Disbursement Certification form.

10. Click Submit to submit the form, or click Reset to reset the form and start again.

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

**IMPORTANT!** School users should print this page prior to submission and keep a copy for their records.
Appendix - Export Mass Update Reports to Excel

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

**Before Mass Update**

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

![Excel spreadsheet screenshot](attachment:spreadsheet.png)
After Mass Update

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

The example below shows the results for a successful mass update.
Created in 1963 by the Pennsylvania General Assembly, the Pennsylvania Higher Education Assistance Agency (PHEAA) has evolved into one of the nation's leading student aid organizations. Today, PHEAA is a national provider of student financial services, serving millions of students and thousands of schools through its loan guaranty, loan servicing, financial aid processing, outreach, and other student aid programs.

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

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

### Board of Directors

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<thead>
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<th>Representative Michael Peifer</th>
<th>Representative Mark Longietti</th>
<th>Chancellor Timothy R. Thyreen</th>
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<td>Mercer</td>
<td>Waynesburg</td>
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<td>Representative Maureen E. Madden</td>
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<td>Monroe</td>
<td>Vacant</td>
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<td>Representative Steven C. Mentzer</td>
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<td>Representative Jennifer O'Mara</td>
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<td>Senator Kristin Phillips-Hill</td>
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<td>Monroe/Northampton</td>
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<tr>
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<td>Representative Curtis G. Sonney</td>
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Pennsylvania Higher Education Assistance Agency
1200 North Seventh Street, Harrisburg, PA 17102-1444 • 1-800-692-7392

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