



**STATE GRANT PARTNER
INTERFACE USER GUIDE**

NOTES:

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School Portal State Grant Partner Interface

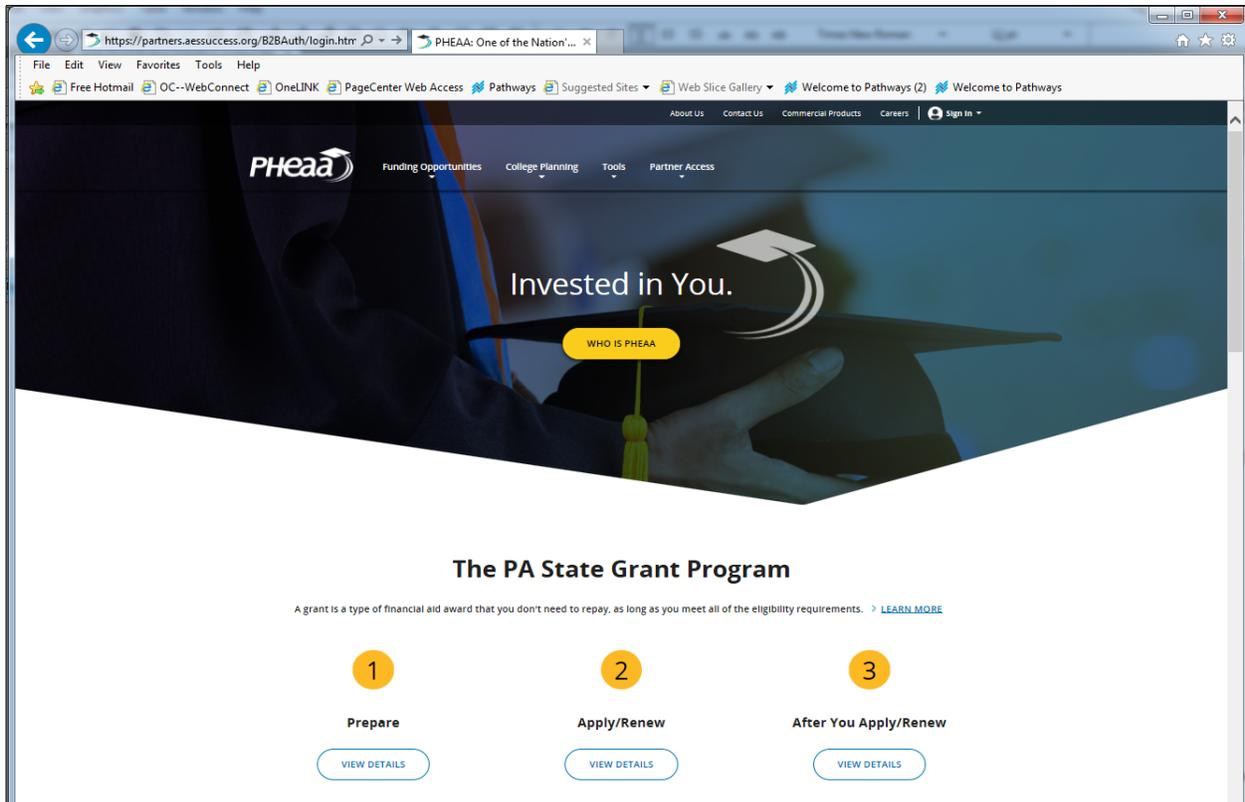
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Introduction

The Grants Partner Interface is a Web portal that allows school users to manage Pennsylvania State grant student records on the Web. 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.

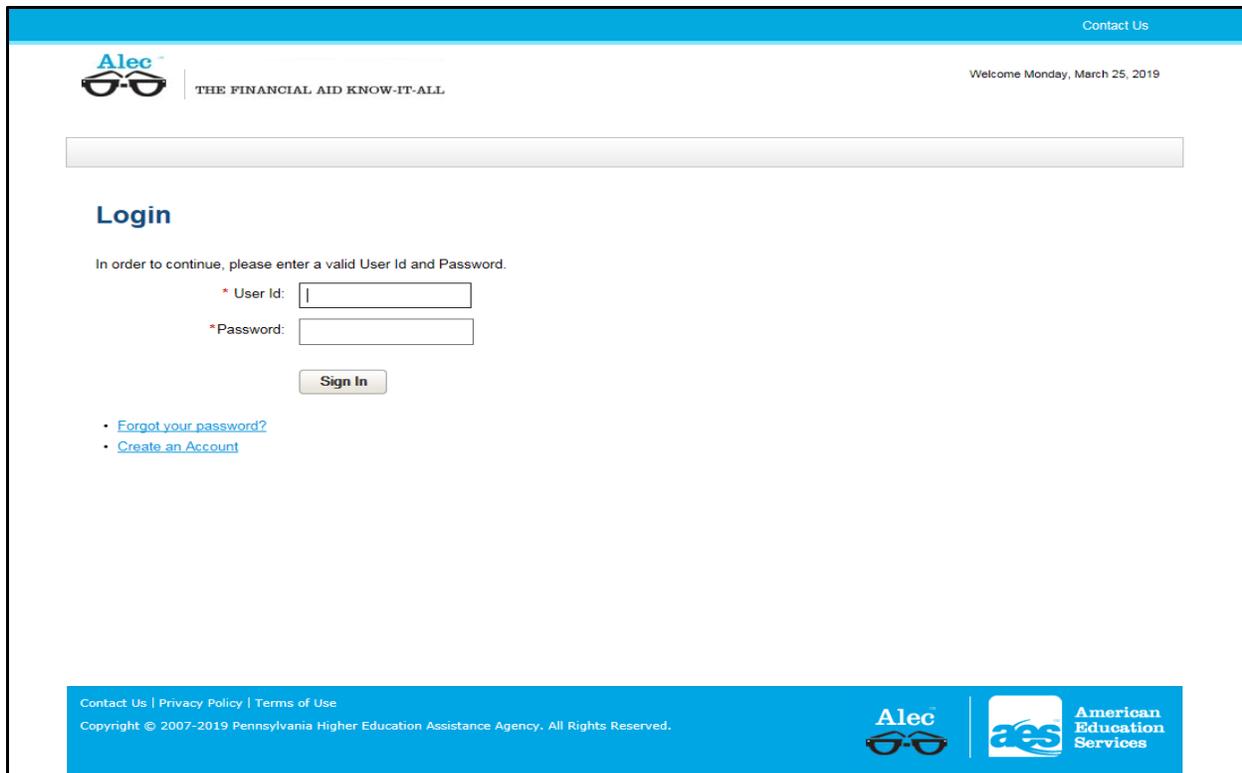
For information about using the Grants Partner Interface for the Ready to Succeed Scholarship (RTSS) program, see the user guide **WB0139-School Portal Ready-to-Succeed Scholarship Partner Interface_User Guide_PHEAA**. For information about using the Grants Partner Interface for the Distance Education Pilot Program for years 2017-18 and prior, refer to user guide **WB0138-School Portal Distance Education Partner Interface_User Guide_PHEAA**.

Accessing the Grants Partner Interface



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

The **Login** screen displays.



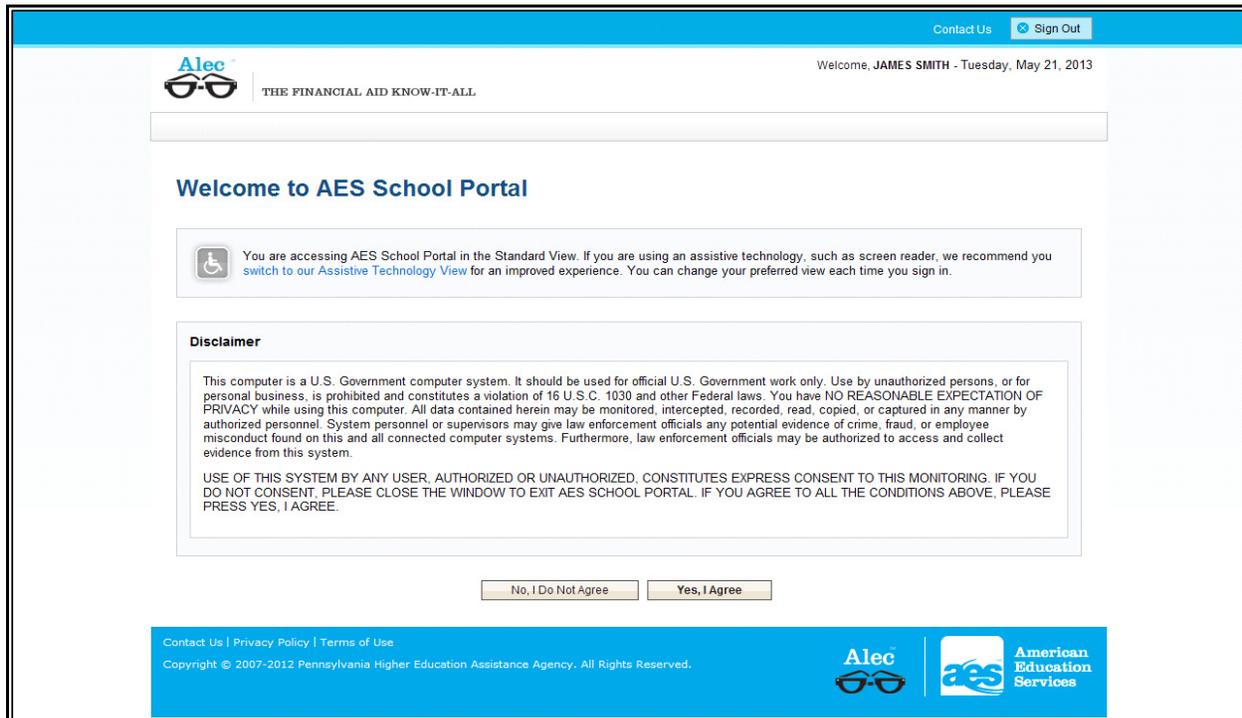
The screenshot shows the login interface for Alec. At the top right, there is a "Contact Us" link. The Alec logo and tagline "THE FINANCIAL AID KNOW-IT-ALL" are on the left, and the date "Welcome Monday, March 25, 2019" is on the right. A large horizontal bar is positioned above the "Login" heading. Below the heading, a message states: "In order to continue, please enter a valid User Id and Password." There are two input fields: "* User Id:" and "* Password:". A "Sign In" button is located below the password field. Two links are provided: "[Forgot your password?](#)" and "[Create an Account](#)". The footer contains "Contact Us | Privacy Policy | Terms of Use", "Copyright © 2007-2019 Pennsylvania Higher Education Assistance Agency. All Rights Reserved.", and logos for Alec and American Education Services.

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

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

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

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

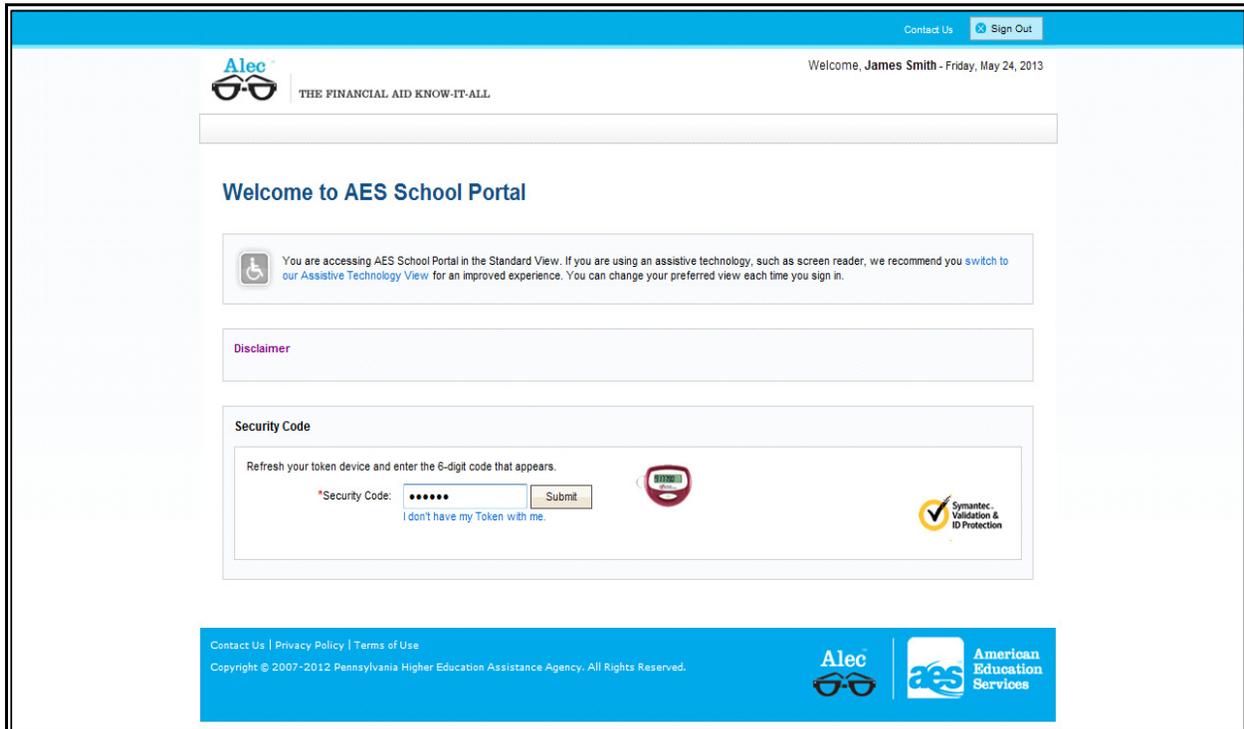


The screenshot shows the AES School Portal interface. At the top right, there are links for "Contact Us" and "Sign Out". Below this, the user is greeted with "Welcome, JAMES SMITH - Tuesday, May 21, 2013". The Alec logo and tagline "THE FINANCIAL AID KNOW-IT-ALL" are on the left. The main heading is "Welcome to AES School Portal". A notice box with an accessibility icon states: "You are accessing AES School Portal in the Standard View. If you are using an assistive technology, such as screen reader, we recommend you switch to our Assistive Technology View for an improved experience. You can change your preferred view each time you sign in." Below this is a "Disclaimer" section with the following text: "This computer is a U.S. Government computer system. It should be used for official U.S. Government work only. Use by unauthorized persons, or for personal business, is prohibited and constitutes a violation of 16 U.S.C. 1030 and other Federal laws. You have NO REASONABLE EXPECTATION OF PRIVACY while using this computer. All data contained herein may be monitored, intercepted, recorded, read, copied, or captured in any manner by authorized personnel. System personnel or supervisors may give law enforcement officials any potential evidence of crime, fraud, or employee misconduct found on this and all connected computer systems. Furthermore, law enforcement officials may be authorized to access and collect evidence from this system. USE OF THIS SYSTEM BY ANY USER, AUTHORIZED OR UNAUTHORIZED, CONSTITUTES EXPRESS CONSENT TO THIS MONITORING. IF YOU DO NOT CONSENT, PLEASE CLOSE THE WINDOW TO EXIT AES SCHOOL PORTAL. IF YOU AGREE TO ALL THE CONDITIONS ABOVE, PLEASE PRESS YES, I AGREE." At the bottom of the disclaimer box are two buttons: "No, I Do Not Agree" and "Yes, I Agree". The footer contains "Contact Us | Privacy Policy | Terms of Use", "Copyright © 2007-2012 Pennsylvania Higher Education Assistance Agency. All Rights Reserved.", and logos for Alec and American Education Services.

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

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

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



The screenshot shows the AES School Portal login interface. At the top right, there are links for "Contact Us" and "Sign Out". The user is greeted with "Welcome, James Smith - Friday, May 24, 2013". The Alec logo and tagline "THE FINANCIAL AID KNOW-IT-ALL" are on the left. A search bar is present below the logo. The main heading is "Welcome to AES School Portal". Below this is an accessibility notice: "You are accessing AES School Portal in the Standard View. If you are using an assistive technology, such as screen reader, we recommend you switch to our Assistive Technology View for an improved experience. You can change your preferred view each time you sign in." A "Disclaimer" link is also visible. The "Security Code" section prompts the user to "Refresh your token device and enter the 6-digit code that appears." It features a "Security Code" input field with six asterisks, a "Submit" button, and a link for "I don't have my Token with me." There are also icons for a token device and Symantec Validation & ID Protection. The footer contains "Contact Us | Privacy Policy | Terms of Use", copyright information for the Pennsylvania Higher Education Assistance Agency, and logos for Alec and American Education Services.

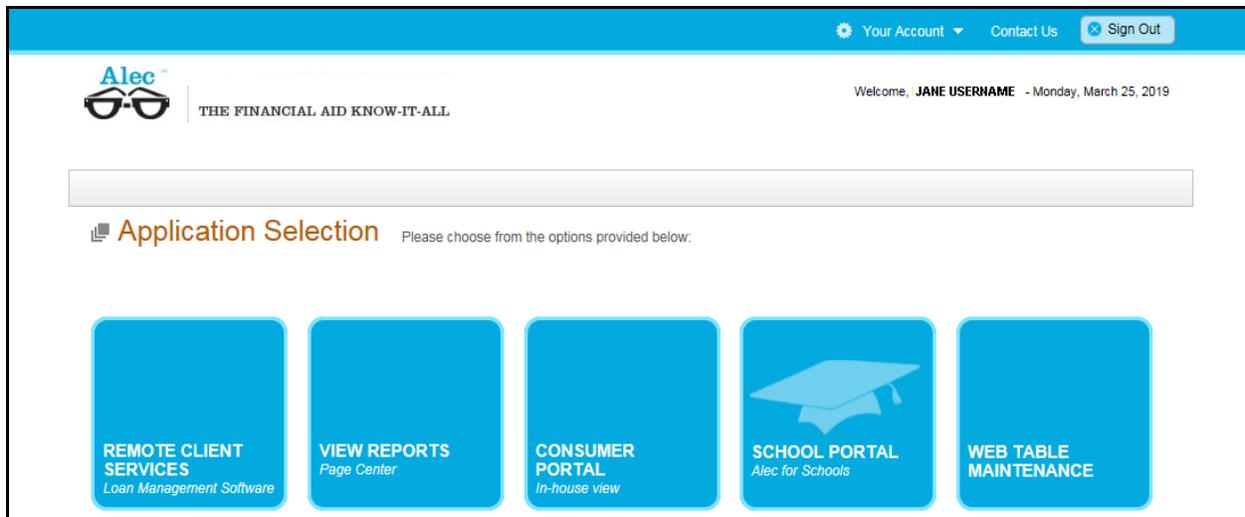
7. Refresh the token device.
8. In the **Security Code** field, enter the six-digit security code that was generated by the token device.

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

9. Click the **Submit** button.

School Portal State Grant Partner Interface

The **Application Selection** screen displays.



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

The Alec school portal displays.

The screenshot shows the Alec school portal interface. At the top, there is a search bar for grants, a user account menu, and a logout button. The main navigation bar includes Home, State Grants, Loan Processing, and Reports & Files. The content area is divided into several sections:

- State Grants:** Contains links for viewing the dashboard, creating update queues, viewing education costs, and requesting school changes.
- Loan Processing:** Contains links for viewing AES accounts and direct access to the AES system.
- Reports & Files:** Contains links for standard reports and sending/receiving files.
- Messages:** Indicates there are currently no messages.
- Alerts (Notifications):** Shows that the user has no alerts.
- Order Materials:** Provides information on program materials.
- Training & Publications:** Includes links for training event schedules, document libraries, loan notes, and common manuals.
- Default Prevention:** Offers resources for dealing with debt, including YCDWI downloads.

The footer contains the Alec logo, American Education Services logo, and copyright information for the Pennsylvania Higher Education Assistance Agency.

Search for Students in the State Grant System

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

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

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

School Portal State Grant Partner Interface

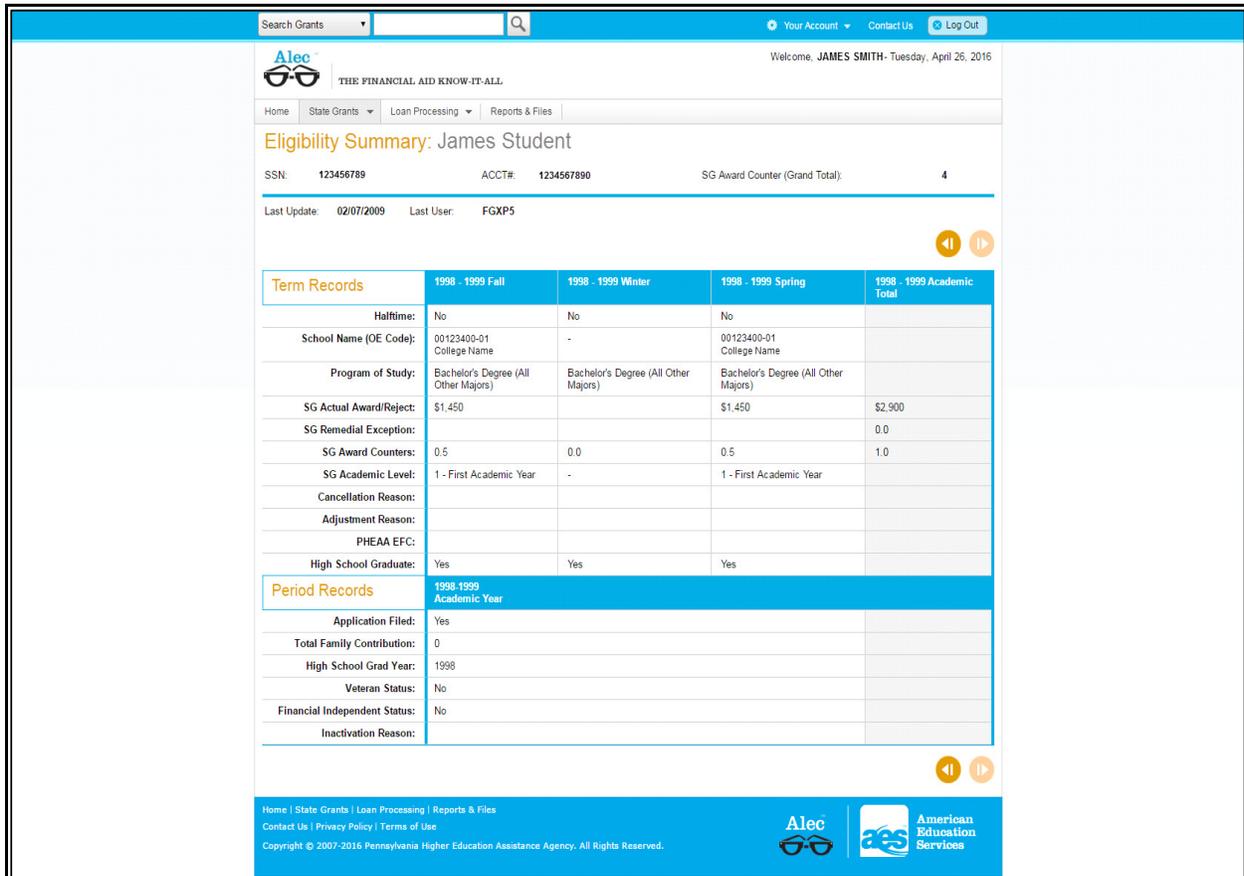
NOTE: The drop down list does not display for school users with access only to State Grant information. In this case, only **Search Grants** displays.

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 the **Search** button.

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

School Portal State Grant Partner Interface

The student's **Eligibility Summary** displays if the user searched by account ID or SSN and the most recent record for the student is prior to the 2007-08 academic year.



The screenshot displays the 'Eligibility Summary' for James Student. The interface includes a search bar, navigation links, and a table of term records.

Eligibility Summary: James Student

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

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

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

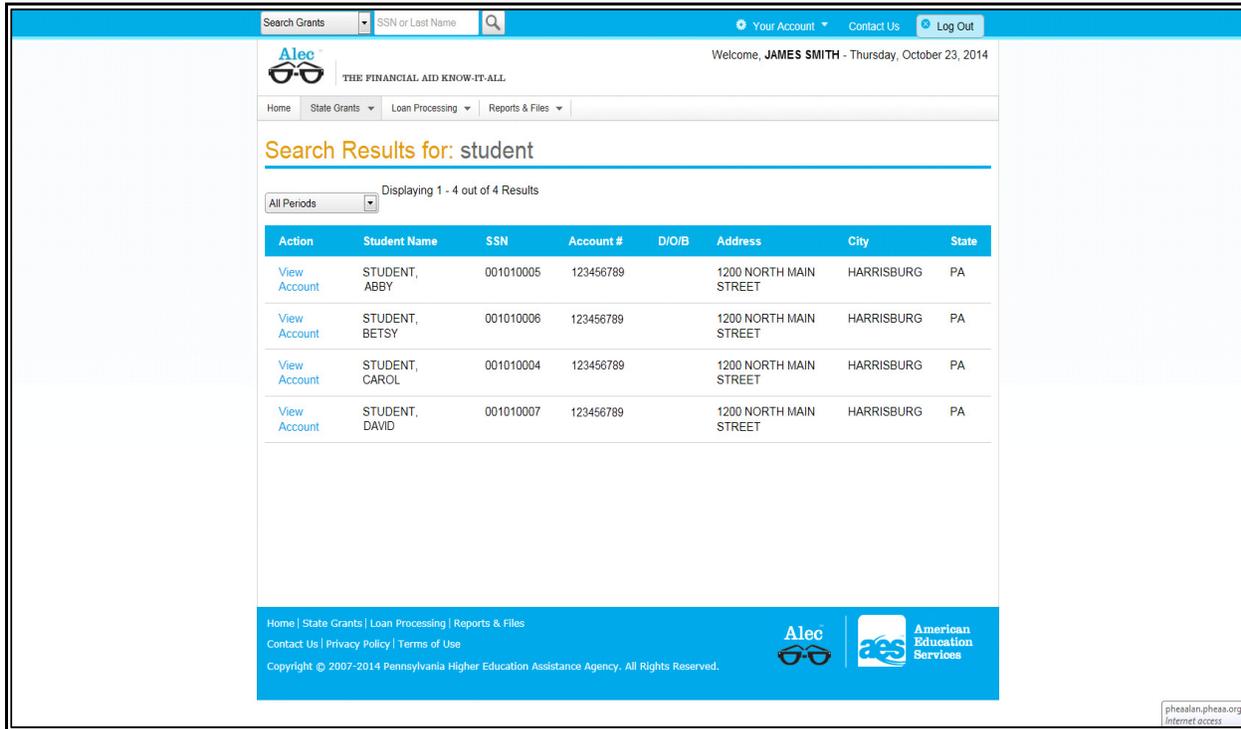
Period Records
1998-1999 Academic Year

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

Footer: Home | State Grants | Loan Processing | Reports & Files | Contact Us | Privacy Policy | Terms of Use | Copyright © 2007-2016 Pennsylvania Higher Education Assistance Agency. All Rights Reserved. | Alec | American Education Services

See [View Eligibility Record](#) for more information about the Eligibility Record.

The **Search Results** page redisplay a list of accounts that match the criteria entered in the search field. This screen displays only if the school user searched by last name and more than one student exists with that name.



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

Welcome, JAMES SMITH - Thursday, October 23, 2014

Home | State Grants | Loan Processing | Reports & Files

Search Results for: student

Displaying 1 - 4 out of 4 Results

Action	Student Name	SSN	Account #	D/O/B	Address	City	State
View Account	STUDENT, ABBY	001010005	123456789		1200 NORTH MAIN STREET	HARRISBURG	PA
View Account	STUDENT, BETSY	001010006	123456789		1200 NORTH MAIN STREET	HARRISBURG	PA
View Account	STUDENT, CAROL	001010004	123456789		1200 NORTH MAIN STREET	HARRISBURG	PA
View Account	STUDENT, DAVID	001010007	123456789		1200 NORTH MAIN STREET	HARRISBURG	PA

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pheaslan.pheaa.org
Internet access

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

- To view a student’s account, click the **View Account** link in the **Action** field.

School Portal State Grant Partner Interface

The **Student Record** page displays. This page displays when a user selects a student from the search results or searches for a student by account ID or SSN and the most recent record for the student is after the 2007-08 academic year.

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.

Your Account
Contact Us
Log Out

THE FINANCIAL AID KNOW-IT-ALL

Home | State Grants | View Students AES Accounts

Welcome, JANE USER - Wednesday, March 7, 2018

Record 1 of 4 Student Records Next Record >

< Back to Student Listing State Grant Information for: 99999997-01 Pheaa Quarter University

Student Record: John Student VIEW ELIGIBILITY FOR STUDENT

2018-2019 ACADEMIC

Prior Name(s):

SSN: 123-45-6789 ACCT#: 11-1111-1111 SG Award Counter (Grand Total): 3.75

Special Request

- Select Action -

Record Status: **Complete** Last Update: 03/07/2018 School Status: **Primary**

Dependency Status: **Financially Independent** Last User: 000000 Received Date: 11/18/2017

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

Award Information

School Notes

Activity Log

Application Info

Student Information

Address: Formuladetermination City, PA 12345 Phone: (717) 555-1111 Email: test@pheaa.org H.S. Graduation: 2010

Grant Information

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	
Award Date:	03/07/2018	03/07/2018	03/07/2018	
Housing Status:	Off Campus	Off Campus	Off Campus	
Enrollment Status:	Full Time Student	Full Time Student	Full Time Student	
Enrollment Mode:	100% classroom instruction	100% classroom instruction	100% classroom instruction	
Award/Reject:	\$1,138	\$1,138	\$1,138	\$3,414
Alternate Award (AA):	\$569	\$569	\$569	\$1,707
Enrollment Status for AA:	Part-Time	Part-Time	Part-Time	
Remedial Exception:				0.0
Award Counters:	0.33	0.33	0.34	1
Award Type:	Processed	Processed	Processed	
Cancellation Reason:				
School Adjustment Reason:				
PHEAA Adjustment Reason:				
Academic Level:	3 - Third Academic Year	3 - Third Academic Year	3 - Third Academic Year	
Total College Cost:	\$20,500	\$20,500	\$20,500	
PHEAA Estimated Pell:	2970	2970	2970	
PHEAA EFC:	2978	2978	2978	

Record 1 of 4 Student Records Next Record >

View Student Records

The **Student Record** displays student, school and grant information for the academic year selected. School users may view students for which their school is listed as the primary on the Free Application for Federal Student Aid (FAFSA). For academic years prior to 2016-17, school users may view students for which their school is listed as the secondary in choices 2 through 10.

Search Grants

[Your Account](#) | [Contact Us](#) | [Log Out](#)

THE FINANCIAL AID KNOW-IT-ALL
Welcome, **SOME PERSON** - Monday, April 1, 2019

Home | State Grants | View Students AES Accounts

State Grant Information for: 00000000-01 COLLEGE UNIVERSITY

Student Record: Stewart Student

VIEW ELIGIBILITY FOR STUDENT

Special Request

- Select Action -

Prior Name(s):
 SSN: **123-45-6789** ACCT#: **11-1111-1111** SG Award Counter (Grand Total): **1** RTSS Award Counter (Grand Total): **0**

2019-2020 ACADEMIC

Record Status: **Complete** Last Update: **04/01/2019** School Status: **Primary**
 Dependency Status: **Veteran** Last User: **P000000** Received Date: **10/01/2018**

State Grant Eligibility Fall: **\$1,754** Spring: **\$1,754**

Award Information
Award Variations
School Notes
Activity Log
Application Info

Student Information

Address: **1200 N 7th Street Harrisburg, PA 17102** Phone: **(717)555-1234** Email: **nobody@pheaa.org** H.S. Graduation: **2018**

Grant Information

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	00000000-01 COLLEGE UNIVERSITY		00000000-01 COLLEGE UNIVERSITY	
Program of Study:	Bachelor's Degree (All Other Majors)		Bachelor's Degree (All Other Majors)	
Award Date:	03/08/2019		03/08/2019	
Housing Status:	Dormitory		Dormitory	
Enrollment Status:	Full Time Student		Full Time Student	
Enrollment Mode:	100% classroom instruction		100% classroom instruction	
Award/Reject:	\$1,754		\$1,754	\$3,508
Alternate Award (AA)	\$877		\$877	\$1,754
Enrollment Status for AA:	Part-Time		Part-Time	
Remedial Exception:				0.0
Award Counters:	0.5		0.5	1
Award Type:	Processed		Processed	
Cancellation Reason:				
School Adjustment Reason:				
PHEAA Adjustment Reason:				
Academic Level:	1 - First Academic Year		1 - First Academic Year	
Total College Cost:	\$17,884		\$17,684	
PHEAA Estimated Pell:	6195		6195	
PHEAA EFC	0		0	

Home | State Grants | View Students AES Accounts

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School Portal State Grant Partner Interface

1. 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 following information displays at the top of the student record.

The **State Grant Information for** 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 **Student Record** field displays the name of the student.

The **Prior Name(s)** field displays the student's prior names.

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 number of terms for all years for which the student has received a State Grant award.

2. To view the student's eligibility record, click the **VIEW ELIGIBILITY FOR STUDENT** link. See [View Eligibility Record](#) for more information.
3. Click the down arrow for **Select Action** and select **Update Record, Cancel or Reinstate, Cost Override** or **Award Adjustment** from the drop-down list. See [Update Student Record](#) for step-by-step instructions.
4. To submit a special request, click the **Special Request** button. See [Submit Special Request](#) for step-by-step instructions.
5. To sort a student's records by academic year, click the down arrow and select the academic year.

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

The following State Grant record fields display for the year and period this is selected in the drop-down list.

The **Record Status** field displays **Complete, Incomplete, Not Screened** or **This is an Inactive Record** to indicate the status of the record.

School Portal State Grant Partner Interface

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

The **School Status** field displays **Primary** if the student has listed the school as his or her first choice in any term. For academic years prior to 2016-17, **Secondary** displays if the student listed the school as choice 2 through 10 on the FAFSA.

NOTE: A Help icon displays to the right of the field. Click the icon to display additional information about the school status.

The **Dependency Status** field displays **Dependent**, **Financially Independent** or **Veteran**, indicating the student's dependency status.

The **Last User** field displays the ID of the user or program that last updated the student's State Grant record.

The **Received Date** field displays the State Grant filing date, which is the date the FAFSA was received.

The **State Grant Eligibility** field displays the student's State Grant award amount for the Fall, Winter and Spring terms.

An informational box, not shown, may display above the tabs depending on the status of the State Grant record. The following informational messages may display:

- **Update Error** displays when there is a data entry error in the State Grant record. Click the arrow to expand the box and display the message that these errors must be corrected by PHEAA.
- **Under Review For** displays where there is a PHEAA-correctable hold in the State Grant record. Click the arrow to expand the box and display the specific reasons why the record is under review, such as **Financial Independence Status** or **Interest and Dividend Review**.
- **Special Edit** displays when the State Grant record has had an automated letter sent to the student. Click the arrow to expand the box and display the review reason, such as **Domicile**, **Veteran Status** or **Crime**.
- **Special Messages** displays important information regarding the status of the student's record. Click the arrow to expand the box and display messages such as **PHEAA Collectible information** or **Income Validation review** status.

Additional student and grant information displays on the following tabs.

- [Award Variations](#)
- [Award Information](#)
- [School Notes](#)
- [Activity Log](#)

School Portal State Grant Partner Interface

- [Application Info](#)

NOTE: The **Award Variations** tab only displays if the Distance Education award adjustment factor is being applied for the academic year or summer session selected.

NOTE: School users can print the Student Record and the selected tab on one page. On the Web browser, select **File** then **Print Preview**. Reduce the print size to 60%—or 50% for the Application Info tab—then select **Print**.

NOTE: The **Ready to Succeed** tab also displays for the student if the school is participating in the Ready to Succeed Scholarship program and the student record for the RTSS program has been updated by the school to disqualify the record, add the Grade Point Average (GPA) or add the academic level. Refer to the user guide **WB0139-School Portal Ready-to-Succeed Scholarship Partner Interface_User Guide_PHEAA** for more information.

Award Variations

The **Award Variations** tab displays if the Distance Education award adjustment factor is being applied for the academic year or summer session selected.

The screenshot shows the 'Award Variations' tab selected for a student record. The page displays the following information:

- Student Record:** Stewart Student
- Record Status:** Complete
- Dependency Status:** Veteran
- State Grant Eligibility:** Fall: \$1,754, Spring: \$1,754
- Enrollment Mode Award/Reject Table:**

	Fall	Winter	Spring	Academic Year Total
Enrollment Mode 1 Award/Reject:	\$1,754		\$1,754	\$3,508
Enrollment Mode 2 Award/Reject:	\$1,600		\$1,600	\$3,200
Enrollment Mode 3 Award/Reject:	\$1,400		\$1,400	\$2,800
Enrollment Mode 4 Award/Reject:	\$1,200		\$1,200	\$2,400

The **Award Variations** tab displays the Enrollment Mode Award/Reject amounts for Fall, Winter and Spring and the Academic Year Total.

Award Information

The **Award Information** tab displays student and grant information in two sections: **Student Information** and **Grant Information**. The information that displays is the same for the regular academic award and for the summer award; however, the summer award information displays on a separate record.

NOTE: This section displays what is available to the primary school user. Refer to [Award Information – Secondary School \(2-10 College Choice\)](#) in Appendix C for more information about what is available to the secondary school choice user for academic years prior to 2016-17. Refer to [Grant Information for Years Prior to 2018-19](#) in Appendix C for a description of the **Award Information** tab for prior years.

Award Information				
Award Information		School Notes	Activity Log	Application Info
Student Information				
Address:	Formuladetermination City, PA 12345	Phone:	(717) 555-1111	Email: test@pheaa.org
				H.S. Graduation: 2010
Grant Information				
	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	
Award Date:	03/07/2018	03/07/2018	03/07/2018	
Housing Status:	Off Campus	Off Campus	Off Campus	
Enrollment Status:	Full Time Student	Full Time Student	Half-time Student	
Enrollment Mode:	100% classroom instruction	100% classroom instruction	100% classroom instruction	
Award/Reject:	\$1,138	\$1,138	\$500	\$2,845
Alternate Award (AA)	\$500	\$500	\$1,138	\$2,278
Enrollment Status for AA:	Part-Time	Part-Time	Full-Time	
Remedial Exception:				0.0
Award Counters:	0.33	0.33	0.17	0.83
Award Type:	Processed	Processed	Processed	
Cancellation Reason:				
School Adjustment Reason:				
PHEAA Adjustment Reason:				
Academic Level:	3 - Third Academic Year	3 - Third Academic Year	3 - Third Academic Year	
Total College Cost:	\$20,500	\$20,500	\$20,500	
PHEAA Estimated Pell:	2970	2970	2970	
PHEAA EFC	2978	2978	2978	
Record 1 of 1 Student Records				

The **Student Information** section displays information about the student for the most recent academic year application on file or the selected academic year if a different one was selected.

School Portal State Grant Partner Interface

The **Address** field displays the student's home address.

The **Phone** field displays the student's home telephone number.

The **Email** field displays the student's email address.

The **H.S. Graduation** field displays the year the student graduated from high school.

The **Grant Information** section displays information about the student's grant for each term and the total for the most recent academic year or the selected academic year if a different one was selected.

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 **Award Date** field displays the date the State Grant was awarded.

The **Housing Status** field displays the student's housing status.

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

The **Enrollment Mode** field displays the student's percentage of classroom or distance education instruction.

The **Award/Reject** field displays the award amount for each term and the total for the academic year, if applicable. A reject reason displays if no award was granted. For the newest academic year, from approximately November through late April, **(EST)** displays after the award amount to indicate estimated eligibility for the primary school.

The **Alternate Award (AA)** field displays the student's award amount if enrollment was changed. If the enrollment is full-time, this field displays part-time award amount and vice versa. This field remains blank if there is a reject or if the award amount cannot be calculated. For example, if the Alternate Award results in no financial need when the student is part-time due to minimum allowable awards, this field remains blank.

The **Enrollment Status for AA** field displays the enrollment status for the **Alternate Award** field.

The **Remedial Exception** field displays an academic year award counter total of terms where a remedial exception was applied.

School Portal State Grant Partner Interface

The **Award Counters** field displays the decimal equivalent of the State Grant award for the term. For example, a part-time semester award equals .25; a part-time quarter award equals .16 or .17.

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

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

The **School Adjustment Reason** field displays **Student Withdrawal from Institution** or **Award Adjusted due to Other Gift Aid**, indicating the reason the school adjusted the award.

The **PHEAA Adjustment Reason** field displays **Award Adjusted due to Collection Case** if there is a PHEAA Collectible. If the reason was due to a 5 Year Co-op Program, **Award Adjusted due to 5th Yr in Co-op Program** displays. Otherwise, **Staff Input** displays if PHEAA adjusted the award for another reason.

The **Academic Level** field displays the student's year in school.

The **Total College Cost** field displays the total PHEAA-approved college costs for each term and the total for the academic year.

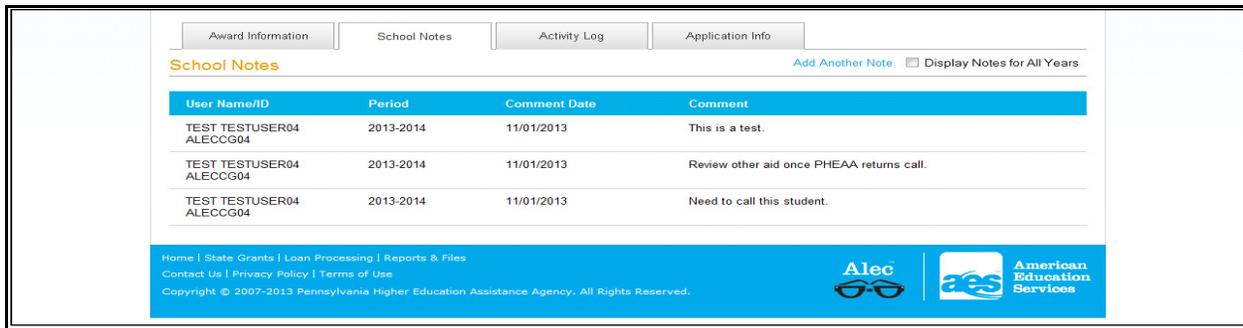
The **PHEAA Estimated Pell** field displays the student's estimated PHEAA Pell award for each term and the total for the academic year.

The **PHEAA EFC** field displays the student's Expected Family Contribution for each term and the total for the academic year as calculated by PHEAA.

NOTE: To print the Student Record and the Award Information tab on one page, click **File** then **Print Preview** on the Web browser. Reduce the print size to 60% then select **Print**.

School Notes

The **School Notes** tab displays a history of comments added by the school. These comments are entered by the school for informational purposes only. Comments are intended for internal use by the school, are not visible to other schools, and are not readily viewable to PHEAA staff.



The screenshot shows the 'School Notes' tab selected in a navigation menu. Below the menu, there are links for 'Add Another Note' and a checkbox for 'Display Notes for All Years'. A table displays the following data:

User Name/ID	Period	Comment Date	Comment
TEST TESTUSER04 ALECCG04	2013-2014	11/01/2013	This is a test.
TEST TESTUSER04 ALECCG04	2013-2014	11/01/2013	Review other aid once PHEAA returns call.
TEST TESTUSER04 ALECCG04	2013-2014	11/01/2013	Need to call this student.

At the bottom of the interface, there is a footer with navigation links (Home, State Grants, Loan Processing, Reports & Files, Contact Us, Privacy Policy, Terms of Use), copyright information (© 2007-2013 Pennsylvania Higher Education Assistance Agency), and logos for Alec and American Education Services.

The **User Name/ID** field displays the name and ID of the user who added the comment.

The **Period** field displays the academic year or summer term for which the comment was added.

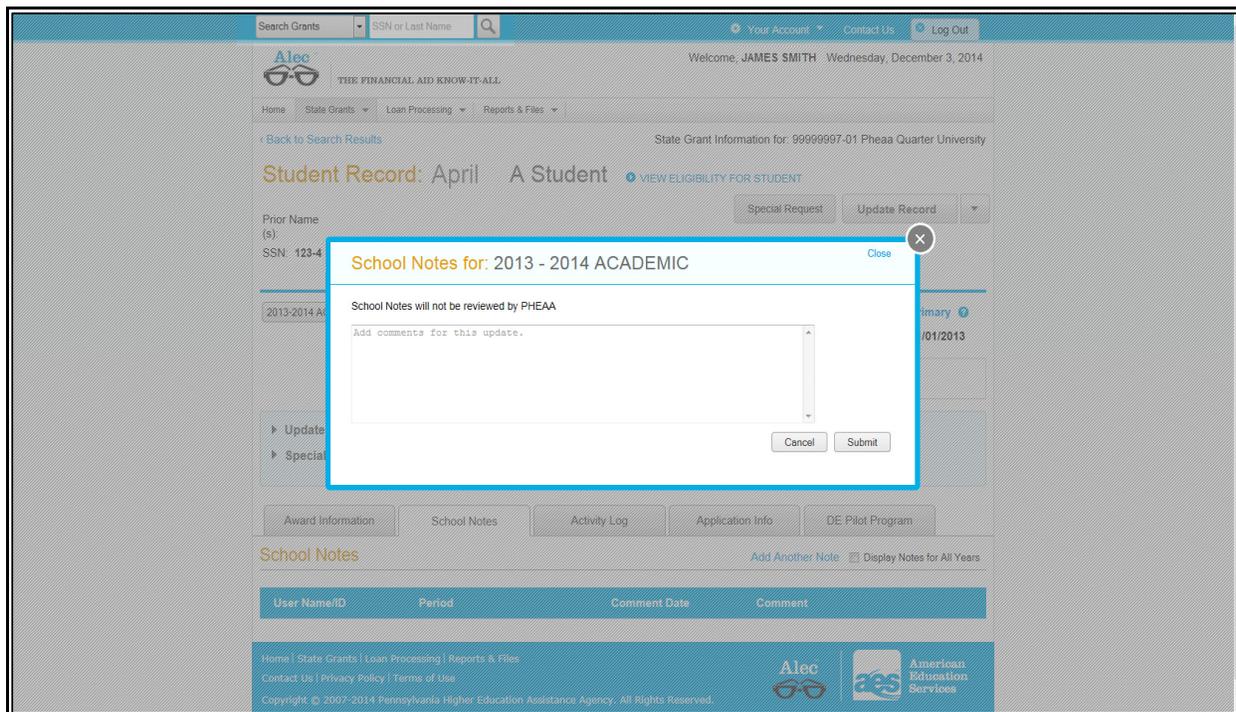
The **Comment Date** field display the date the comment was added.

The **Comment** field displays the comment entered by the school user for informational purposes.

1. To display notes for all academic years, check **Display Notes for All Years**.
2. To view additional comments if more than 15 comments exist, click the down arrow in the **Page** field, not shown, and select a page number from the drop-down list, or click the left and right arrows, not shown, to scroll through the pages.
3. To add a note, click the **Add Another Note** link.

NOTE: To print the Student Record and the School Notes tab on one page, click **File** then **Print Preview** on the Web browser. Reduce the print size to 60% then select **Print**.

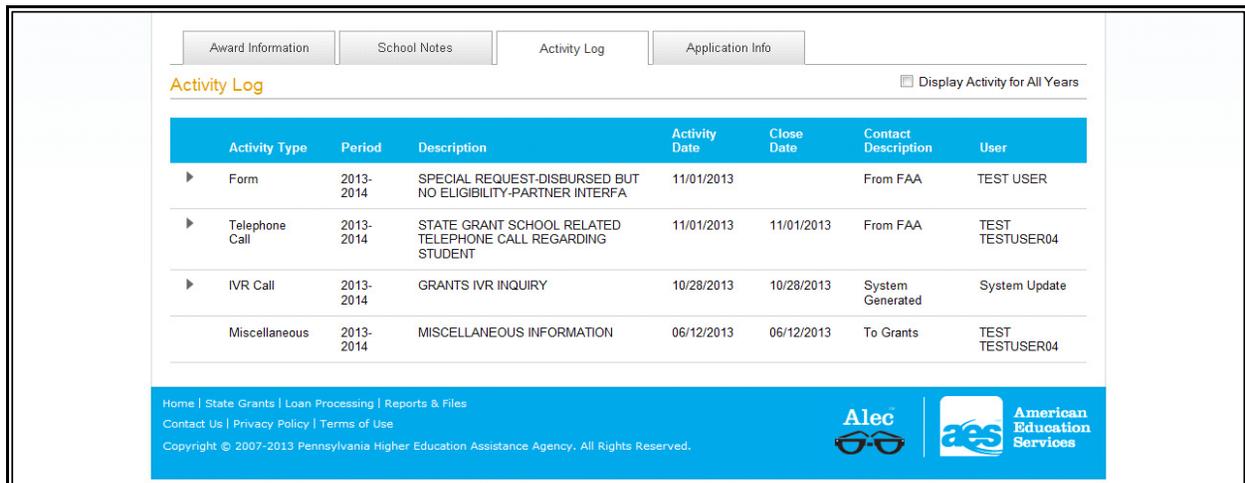
The **School Notes** comment box displays to add another note. It indicates the academic year for which the comment will be added. The academic year was selected when the user selected the record to view.



4. Enter a comment in the **School Notes** text box.
5. Click the **Submit** button to submit the comment, or click the **Cancel** button to close the **School Notes** box without saving the comment.

Activity Log

The **Activity Log** tab displays all activity and correspondence that occurs on the account. It cannot be updated by the school user.



The screenshot shows the 'Activity Log' tab selected in a navigation bar. Below the tabs, there is a checkbox labeled 'Display Activity for All Years'. The main content is a table with the following data:

Activity Type	Period	Description	Activity Date	Close Date	Contact Description	User
▶ Form	2013-2014	SPECIAL REQUEST-DISBURSED BUT NO ELIGIBILITY-PARTNER INTERFA	11/01/2013		From FAA	TEST USER
▶ Telephone Call	2013-2014	STATE GRANT SCHOOL RELATED TELEPHONE CALL REGARDING STUDENT	11/01/2013	11/01/2013	From FAA	TEST TESTUSER04
▶ IVR Call	2013-2014	GRANTS IVR INQUIRY	10/28/2013	10/28/2013	System Generated	System Update
Miscellaneous	2013-2014	MISCELLANEOUS INFORMATION	06/12/2013	06/12/2013	To Grants	TEST TESTUSER04

At the bottom of the interface, there is a footer with navigation links (Home, State Grants, Loan Processing, Reports & Files, Contact Us, Privacy Policy, Terms of Use), copyright information (© 2007-2013 Pennsylvania Higher Education Assistance Agency), and logos for Alec and American Education Services.

The **Activity Type** field displays the type of activity or correspondence that occurred on the account, such as email or telephone call.

The **Period** field displays the academic year or summer term for which the activity was added.

The **Description** field displays a description of the activity.

The **Activity Date** field displays the date the activity occurred on the account.

The **Close Date** field displays the date the activity was closed or resolved. If the field is blank, the request for action is still pending.

The **Contact Description** field displays the person to whom the activity was directed.

The **User** field displays the name of the user who logged the activity.

1. To view additional activity records if more than 15 activities exist, click the down arrow in the **Page** field, not shown, and select a page number from the drop-down list, or click the left and right arrows, not shown, to scroll through the pages.
2. To display activity for all years, check **Display Activity for All Years**.
3. If additional activity comments are available, an arrow will display to the left of the activity. Click the arrow to expand or collapse activity records.



School Portal State Grant Partner Interface

NOTE: To print the Student Record and the Activity Log on one page, click **File** then **Print Preview** on the Web browser. Reduce the print size to 60% then select **Print**.

Application Info

The **Application Info** tab displays the application information which correlates to the Status Notice Items displayed on pages 2 through 4 of the State Grant record and to all questions asked on a paper Status Notice. Some of this information may be populated by submission of the FAFSA or State Grant Form (SGF). If the application is incomplete, a red dot displays on the **Application Info** tab and the following message displays on the screen: **Information is incomplete. Required fields are highlighted below.** Otherwise, the following message displays: **The information displayed is the most recent information entered in the Status Notice Application.**

Award Information		School Notes		Activity Log		Application Info	
Application Info							
The information displayed is the most recent information entered in the Status Notice Application.							
				Student		Parent(s)	
1. Date of Birth:	05/17/1984						
2. State of Legal Residence:	PA						
3. Residency Established:							
4. Current Marital Status:	Unmarried/Single						
5. Bachelor's Degree Before 7/1 of Application Year:	No						
6. High School Diploma or GED Date:	06/2005						
7. High School State or GED:	PA						
8A. Veteran of the U.S. Armed Forces:	No						
8B. Month/Year of Discharge:							
9. Number of Family Members:	1						
10. Number of College Students:	0						
				Student		Parent(s)	
11. Tax Return Filed:	Have Filed						
12. Type of Tax Return:	1040 EZ/A						
13. Total Number of Exemptions:	1						
14. Adjusted Gross Income:	\$7,644						
15. Income of Student/Father/Parent 1:	\$7,644						
15A. Income of Spouse/Mother/Parent 2:							
20. Income Tax Paid:	\$264						
21. Investment Net Worth:	\$0						
21A. PA Treasury 529 College Savings Program:	\$0						
22. Business Farm Net Worth:	\$0						
23. Cash/Savings/Checking:	\$412						
24. Student Resides With:	Both Parents						
25. Employment Status of Father/Stepparent/Parent 1:	-						
26. Employment Status of Mother/Stepparent/Parent 2:	-						
27. Student's Employment Status:	Employed by Another						
28. Spouse's Employment Status:							
29. SSN of Father/Stepparent/Parent 1:	-						
30. SSN of Mother/Stepparent/Parent 2:	-						
31. Spouse's SSN:	123-45-6789						
				Student			
32. School Attending (First Choice):	Refer to Award Info Tab						
33. Student's Housing Status:	Refer to Award Info Tab						
34. Student's Enrollment Status:	Refer to Award Info Tab						
35. Student's Year in School:	Refer to Award Info Tab						
36. Student's Program of Study:	Refer to Award Info Tab						
37. Signature:	Student and Parent						

School Portal State Grant Partner Interface

The following demographic and academic information is populated in the **Student** and **Parent(s)** columns if the student is a dependent student. If the student is independent or a veteran, only the **Student** column is populated.

The **Date of Birth** field displays the student's date of birth.

The **State of Legal Residence** field displays the student's state of legal residence. The parent's information displays in the **Parents** column if the student is a dependent.

The **Residency Established** field displays the date the student's residency was established. The parent's information displays in the **Parents** column if the student is a dependent.

The **Current Marital Status** field displays the student's marital status. The parent's information displays in the **Parents** column if the student is a dependent.

The **Bachelor's Degree Before 7/1 of Application Year** field displays **Yes** or **No**, indicating whether the student has received a bachelor's degree before July 1 of the application year.

The **High School Diploma or GED Date** field displays the date the student received his or her high school diploma or GED.

The **High School State or GED** field displays the location of the high school from which the student received his or her diploma. **GED** displays instead of the high school location if the student received a General Equivalency Diploma.

The **Veteran of the U.S. Armed Forces** field displays **Yes** or **No**, indicating whether the student is a veteran of the U.S. armed forces.

The **Month/Year of Discharge** field displays the month and year the student was discharged from the U.S. armed forces.

The **Number of Family Members** field displays the number of family members in the student's household. The parent's information displays in the **Parents** column if the student is a dependent.

The **Number of College Students** field displays the number of college students in the student's household. The parent's information displays in the **Parents** column if the student is a dependent.

The following financial information is populated in the **Student** and **Parent(s)** columns if the student is a dependent student. If the student is independent or a veteran, only the **Student** column is populated.

The **Tax Return Filed** field displays the status of the tax return.

The **Type of Tax Return** field displays the IRS' tax return form number.

The **Total Number of Exemptions** field displays the total number of exemptions from the tax return.

The **Adjusted Gross Income** field displays the adjusted gross income from the tax return.

The **Income of Student/Father/Parent 1** field displays the income for the student in the **Student** column and the income for the student's father or parent 1 in the **Parent** column if the student is a dependent.

The **Income of Spouse/Mother/Parent 2** field displays the income for the student's spouse in the **Student** column and the income for the student's mother or parent 2 in the **Parent** column if the student is a dependent.

The **Income Tax Paid** field displays the amount of income tax paid.

The **Investment Net Worth** field displays the new worth of investments.

The **PA Treasury 529 College Savings Program** field displays the Pennsylvania Treasury 529 College Savings Program value which was included in the **Investment Net Worth** field.

The **Business Farm Net Worth** field displays the net worth of a business farm.

The **Cash/Savings/Checking** field displays the balance of cash, savings and checking accounts.

The **Student Resides With** field indicates with whom the student resides.

The **Employment Status of Father/Stepparent/Parent 1** field displays the employment status of the father, stepparent, or parent 1.

The **Employment Status of Mother/Stepparent/Parent 2** field displays the employment status of the mother, stepparent, or parent 2.

The **Student's Employment Status** field displays the student's employment status.

The **Spouse's Employment Status** field displays the spouse's employment status.

The **SSN of Father/Stepparent/Parent 1** field displays the nine-digit Social Security number of the father, stepparent, or parent 1.

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The **SSN of Mother/Stepparent/Parent 2** field displays the nine-digit Social Security number of the mother, stepparent, or parent 2.

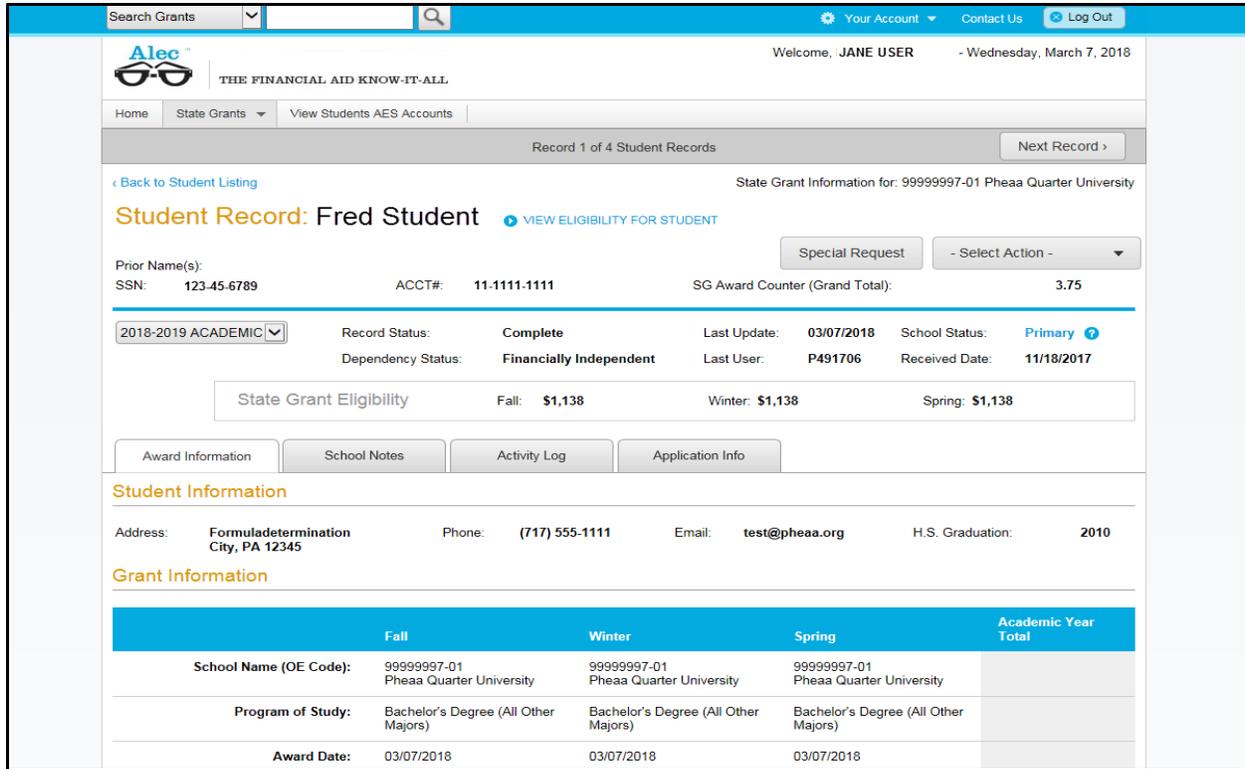
The **Spouse's SSN** field displays the spouse's nine-digit Social Security Number.

The **School Attending (First Choice)**, **Student's Housing Status**, **Student's Enrollment Status**, **Student's Year in School**, and the **Student's Program of Study** fields display the student's school information. The information is initially populated for the full year based upon the application submission but is subject to change on a term-by-term basis at the request of the student or school. These fields display **Refer to Award Info Tab** since they are stored at an academic term and period level rather than a student and parent level. See [Award Information](#) and [Award Information – Secondary School \(2-10 College Choice\)](#) for more information.

The **Signature** field indicates who provided a signature.

NOTE: To print the Student Record and the **Application Info** tab on one page, click **File** then **Print Preview** on the Web browser. Reduce the print size to 50% then select **Print**.

View Eligibility Record



The screenshot displays the 'Student Record' for Fred Student. The interface includes a search bar, navigation tabs (Home, State Grants, View Students AES Accounts), and a user welcome message for JANE USER. The record shows the student is currently in the 2018-2019 Academic Year with a 'Complete' status. Key details include SSN: 123.45.6789, ACCT#: 11-1111-1111, and a Grand Total SG Award Counter of 3.75. The record is financially independent. Eligibility amounts are listed as \$1,138 for each semester (Fall, Winter, Spring). The student's information includes the address: Formuladetermination City, PA 12345, phone: (717) 555-1111, email: test@pheaa.org, and H.S. Graduation year: 2010. A table below provides a breakdown of grant information by semester and academic year total.

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	
Award Date:	03/07/2018	03/07/2018	03/07/2018	

1. To view the student's eligibility record, click the **VIEW ELIGIBILITY FOR STUDENT** link on the student record.

The **Eligibility Summary** displays.

NOTE: For examples of screens for academic year 2014-15 and prior years, refer to the [Eligibility Summary for Years 2014 and Prior](#) section in Appendix C.

Record 1 of 1 Student Records

Eligibility Summary: Fred Student

SSN: 123-45-6789 ACCT#: 11-1111-1111 SG Award Counter (Grand Total): 3.58

Term Records	2017 Summer	2018 - 2019 Fall	2018 - 2019 Winter	2018 - 2019 Spring	2018 - 2019 Academic Total	2018 Summer
Halftime:	No	No	No	Yes		Yes
School Name (OE Code):	00000000-01 State College of Town	00000007-01 Pheaa Quarter University	00000007-01 Pheaa Quarter University	00000007-01 Pheaa Quarter University		00000000-01 State College of Town
Program of Study:		Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)		Bachelor's Degree (All Other Majors)
SG Actual Award/Reject:	Pending	\$1,138	\$1,138	\$569	\$2,845	\$580
SG Remedial Exception:	0.0				0.0	0.0
SG Award Counters:	0.5	0.33	0.33	0.17	0.83	0.25
RTSS Actual Award/Reject:						
RTSS Remedial Exception:						
RTSS Counters:					0.0	
SG Academic Level:	3 - Third Academic Year	3 - Third Academic Year	3 - Third Academic Year	3 - Third Academic Year		3 - Third Academic Year
Cancellation Reason:						
Adjustment Reason:						
PHEAA EFC:		2978	2978	2978		
High School Graduate:	Yes	Yes	Yes	Yes		Yes

Period Records	2017 Summer	2018-2019 Academic Year	2018 Summer
Application Filed:	Yes	Yes	Yes
Total Family Contribution:			
RTSS Academic Level:			
High School Grad Year:	2010	2010	2010
Veteran Status:	No	No	No
Financial Independent Status:	Yes	Yes	Yes
Inactivation Reason:			

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.

- 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.

School Portal State Grant Partner Interface

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.

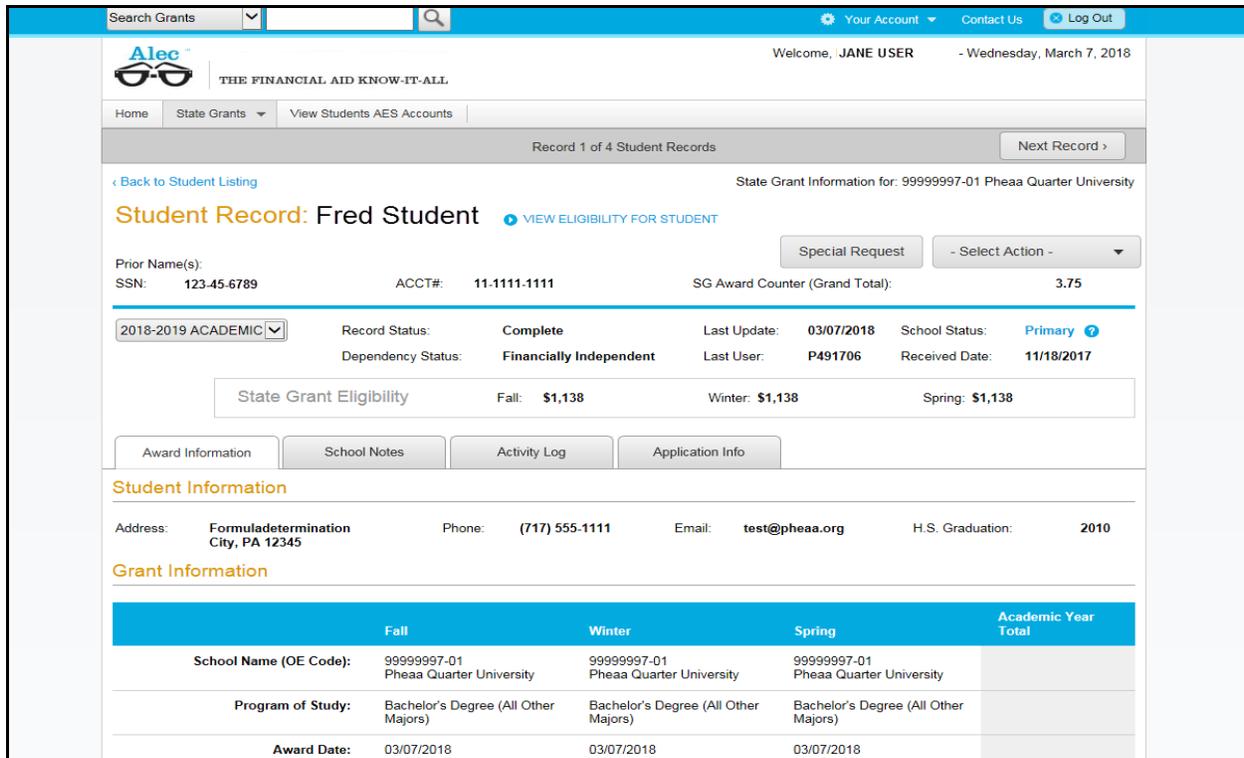
The **Veteran Status** field displays **Yes** or **No**, indicating whether the student is a veteran.

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.

Update Student Record

School users can update information on the student record when certifying eligibility for the Pennsylvania State Grant. Only a school user from the student’s primary school may update the student record.



The screenshot displays the 'Student Record' page for Fred Student. At the top, there is a search bar and navigation links for 'Your Account', 'Contact Us', and 'Log Out'. The user is identified as JANE USER, and the date is Wednesday, March 7, 2018. The page shows the student's record for the 2018-2019 academic year, with a record status of 'Complete' and a dependency status of 'Financially Independent'. The SG Award Counter (Grand Total) is 3.75. The State Grant Eligibility section shows awards for Fall, Winter, and Spring semesters, each for \$1,138. Below this, there are tabs for 'Award Information', 'School Notes', 'Activity Log', and 'Application Info'. The 'Student Information' section includes the address (Formuladetermination City, PA 12345), phone number (717) 555-1111, email (test@pheaa.org), and H.S. Graduation year (2010). The 'Grant Information' section contains a table with columns for Fall, Winter, Spring, and Academic Year Total, detailing the school name, program of study, and award date for each semester.

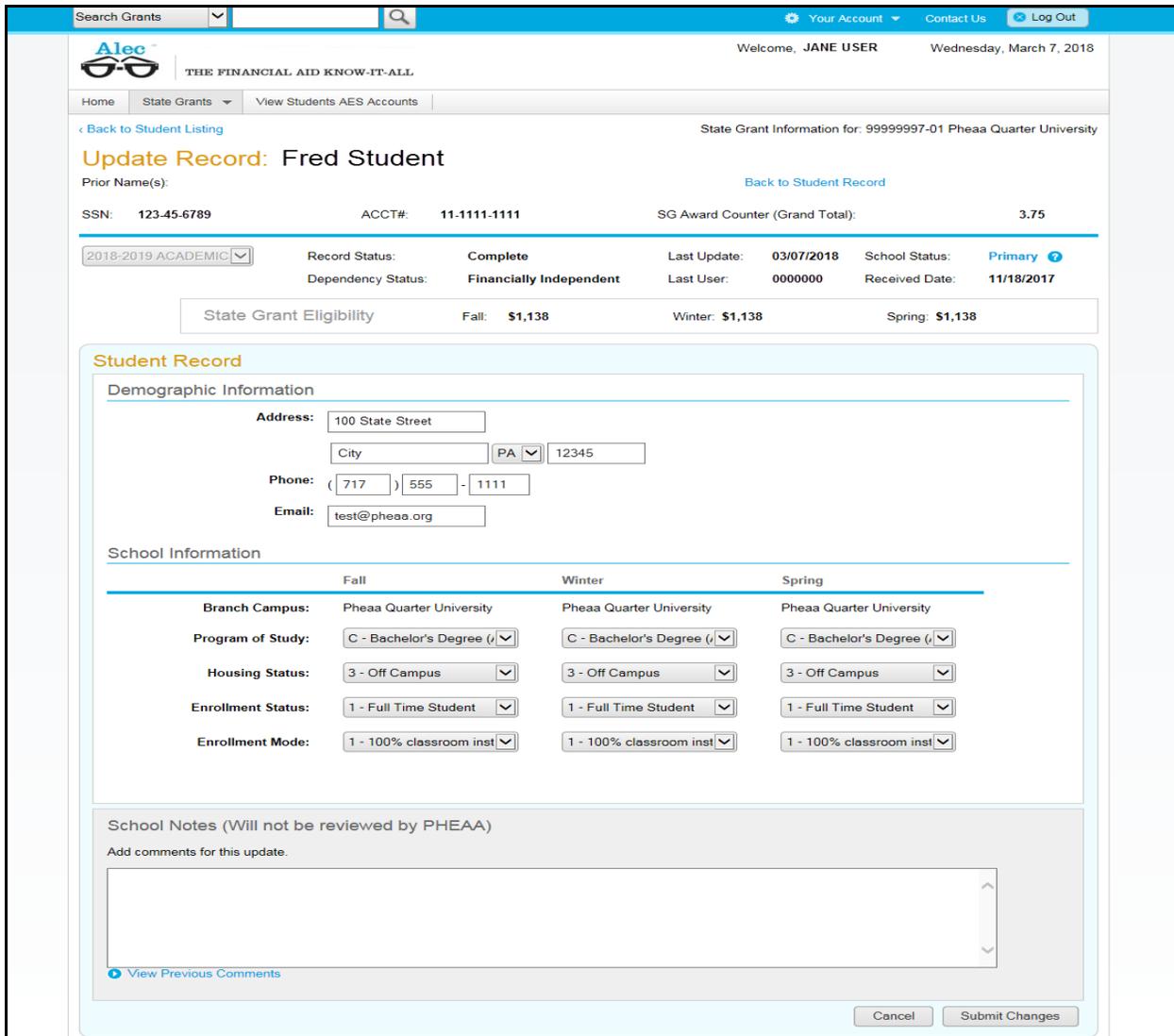
	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	
Award Date:	03/07/2018	03/07/2018	03/07/2018	

1. Click the down arrow in **Select Action** and select **Update Record**, **Cancel or Reinstate**, **Cost Override** or **Award Adjustment** from the drop-down list. See the following sections for more information:
 - [Student Record](#)
 - [Cancellation or Reinstatement](#)
 - [Cost Override](#)
 - [Award Adjustments](#)

NOTE: Ready to Succeed displays for approved schools when the student has potential Ready to Succeed eligibility. **Distance Education** displays for all approved schools for year 2017-18 and prior years. Refer to user guides **WB0138-School Portal Distance Education Partner Interface_User Guide_PHEAA** and **WB0139-School Portal Ready-to-Succeed Scholarship Partner Interface_User Guide_PHEAA** for more information about the Distance Education Pilot Program and Ready to Succeed programs.

Student Record

The **Student Record** section displays the fields of the student’s demographic, school and credit information sections open for edit. To update student record information for years prior to 2018-19, refer to the [Update the Student Record for Years Prior to 2018-19](#) section in this document.



The screenshot shows the 'Update Record' page for a student named Fred. The page includes a navigation bar with 'Search Grants', 'Your Account', 'Contact Us', and 'Log Out'. The user is identified as 'JANE USER' on 'Wednesday, March 7, 2018'. The page title is 'Update Record: Fred Student'. Key information includes SSN: 123-45-6789, ACCT#: 11-1111-1111, and SG Award Counter (Grand Total): 3.75. The record status is 'Complete' and the dependency status is 'Financially Independent'. The last update was on 03/07/2018. The school status is 'Primary'. The record is for the 2018-2019 academic year. State grant eligibility is shown for Fall, Winter, and Spring, all at \$1,138. The 'Student Record' section is divided into 'Demographic Information' and 'School Information'. The 'Demographic Information' section includes fields for Address (100 State Street), City, State (PA), Zip (12345), Phone ((717) 555-1111), and Email (test@pheaa.org). The 'School Information' section is a table with columns for Fall, Winter, and Spring, and rows for Branch Campus, Program of Study, Housing Status, Enrollment Status, and Enrollment Mode. All fields in the 'School Information' table are currently set to 'Pheaa Quarter University', 'C - Bachelor's Degree', '3 - Off Campus', '1 - Full Time Student', and '1 - 100% classroom inst' respectively. Below the 'School Information' table is a 'School Notes' section with a text area for comments and a 'View Previous Comments' link. At the bottom right of the form are 'Cancel' and 'Submit Changes' buttons.

The **Demographic Information** section displays the student’s demographic information.

1. In the **Address** field, enter the student’s home address. Enter the street address, city and zip code. Click the down arrow to select the state from the drop-down list.
2. In the **Phone** field, enter the student’s 10-digit home telephone number.

School Portal State Grant Partner Interface

3. In the **Email** field, enter the student's email address.

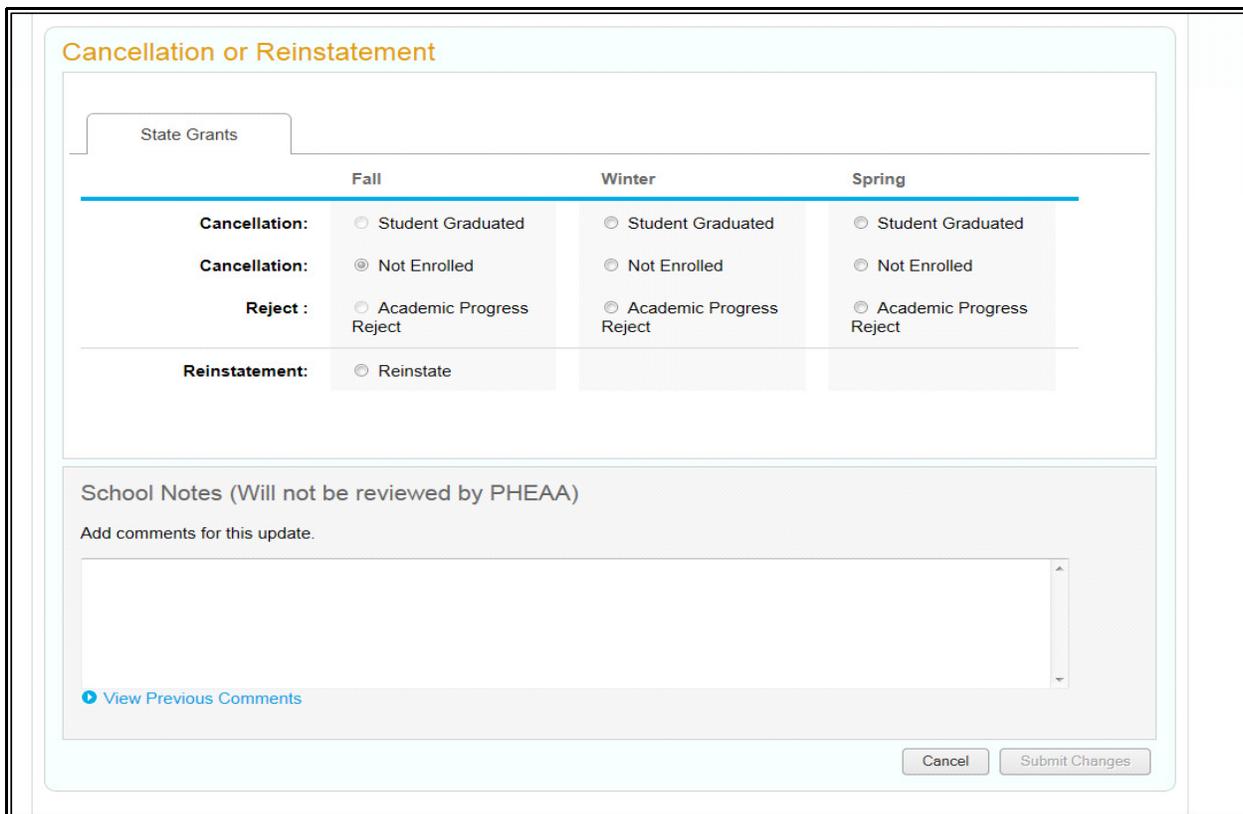
The **School Information** section displays information about the student's school for all terms in the selected academic year. When the school on the State Grant record is not the same for each term, the school users are permitted only to submit updates for the term associated with their school. All other terms are protected and cannot be updated by school users.

4. The **Branch Campus** field displays the name of the school where the student is attending. This field is updateable only by authorized users at schools that have multiple campuses. To change the student's branch campus, click the down arrow and select a branch campus from the drop-down list.
5. Click the down arrow in the **Program of Study** field and select the student's program of study from the drop-down list.
6. Click the down arrow in the **Housing Status** field and select the student's housing status from the drop-down list.
7. Click the down arrow in the **Enrollment Status** field and select the student's enrollment status from the drop-down list.
8. Click the down arrow in the **Academic Level** field and select the student's academic level from the drop-down list. *This field displays for nursing schools only.*
9. Click the down arrow in the **Enrollment Mode** field and select the student's percentage of classroom instruction or distance education.
10. In the **School Notes** field, enter the 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.*
11. Click the **Submit Changes** button to submit the updates made to the **Student Record** section, or click the **Cancel** button to close the **Student Record** section without submitting the updates.

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 is has not made 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.



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

School Notes (Will not be reviewed by PHEAA)

Add comments for this update.

[View Previous Comments](#)

1. In the **Cancellation – Student Graduated** field, check each term to which the cancellation should apply if the cancellation is because the student graduated.
2. 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.
3. In the **Reject – Academic Progress Reject** field, check each term to which the cancellation should apply if the cancellation is due to failure to make satisfactory academic progress for State Grant purposes.

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4. 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.*
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 and will not be reviewed by PHEAA staff.*
6. Click the **Submit Changes** button to submit the updates made to the **Cancellation or Reinstatement** section, or click the **Cancel** button to close the **Cancellation or Reinstatement** section without submitting the updates.

Cost Override

The **Cost Override** section displays information that is required to be reported when a student incurs costs that are more than 25% lower than the PHEAA-approved costs. PHEAA-approved costs are those which were used to process all students at the school. If the record had a previous cost override submitted, the term tuition and fees submitted will display next to the amount label.

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

Cost Override

	Fall	Winter	Spring
Amount:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Enrollment Status:	Full-Time	Full-Time	Part-Time
Tuition & Fee:	\$15,500	\$15,500	\$15,500
Full-time Threshold:	\$3,875	\$3,875	
Part-time Threshold:			\$1,937
	<input type="checkbox"/> Remove Cost Override	<input type="checkbox"/> Remove Cost Override	<input type="checkbox"/> Remove Cost Override

School Notes (Will not be reviewed by PHEAA)

Add comments for this update.

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1. In the **Amount** field, enter the actual tuition and fees incurred by the student for the term for which the cost is more than 25% lower than those annually reported to PHEAA.

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

NOTE: If the student’s enrollment for the term for which the cost override is being applied is incorrect, click **Cancel** to close the **Cost Override** section without submitting the override. Open the **Student Record** section in Edit mode and make the enrollment change. Return to the **Cost Override** section to submit the request.

School Portal State Grant Partner Interface

The **Tuition & Fees** field displays the student's annualized tuition and fees amount used to calculate eligibility. Annualized tuition is tuition and fees for full-time enrollment for the entire year.

The **Full-Time Threshold** field displays the tuition and fees amount divided by the number of terms (two in most cases), then multiplied by .75.

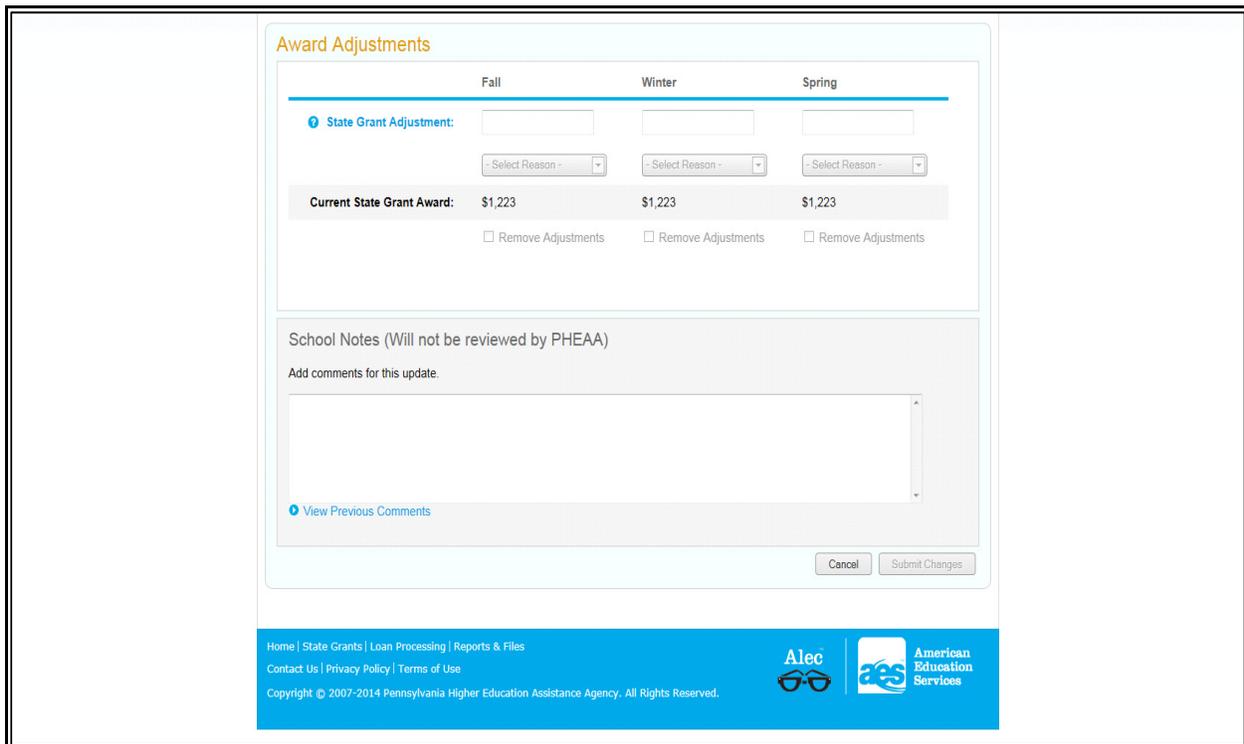
The **Part-Time Threshold** field displays the tuition and fees amount divided by the number of terms (two in most cases), then multiplied by .75 and divided again by 2.

2. Check **Remove Cost Override** to remove the cost override. *This is unprotected only when a cost override has been entered in a previous update.*
3. 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.*
4. Click the **Submit Changes** button to submit the updates made to the **Cost Override** section, or click the **Cancel** button to close the **Cost Override** section without submitting the updates.

Award Adjustments

The **Award Adjustments** 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.



Award Adjustments

	Fall	Winter	Spring
State Grant Adjustment:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	- Select Reason -	- Select Reason -	- Select Reason -
Current State Grant Award:	\$1,223	\$1,223	\$1,223
	<input type="checkbox"/> Remove Adjustments	<input type="checkbox"/> Remove Adjustments	<input type="checkbox"/> Remove Adjustments

School Notes (Will not be reviewed by PHEAA)

Add comments for this update.

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Alec American Education Services

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.

NOTE: To enter an award that is higher than the current award but lower than the original PHEAA-calculated award, first remove the adjustment. 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.

2. Click the down arrow in the **Select Reason** field and select a reason for the adjustment from the drop-down list.

School Portal State Grant Partner Interface

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

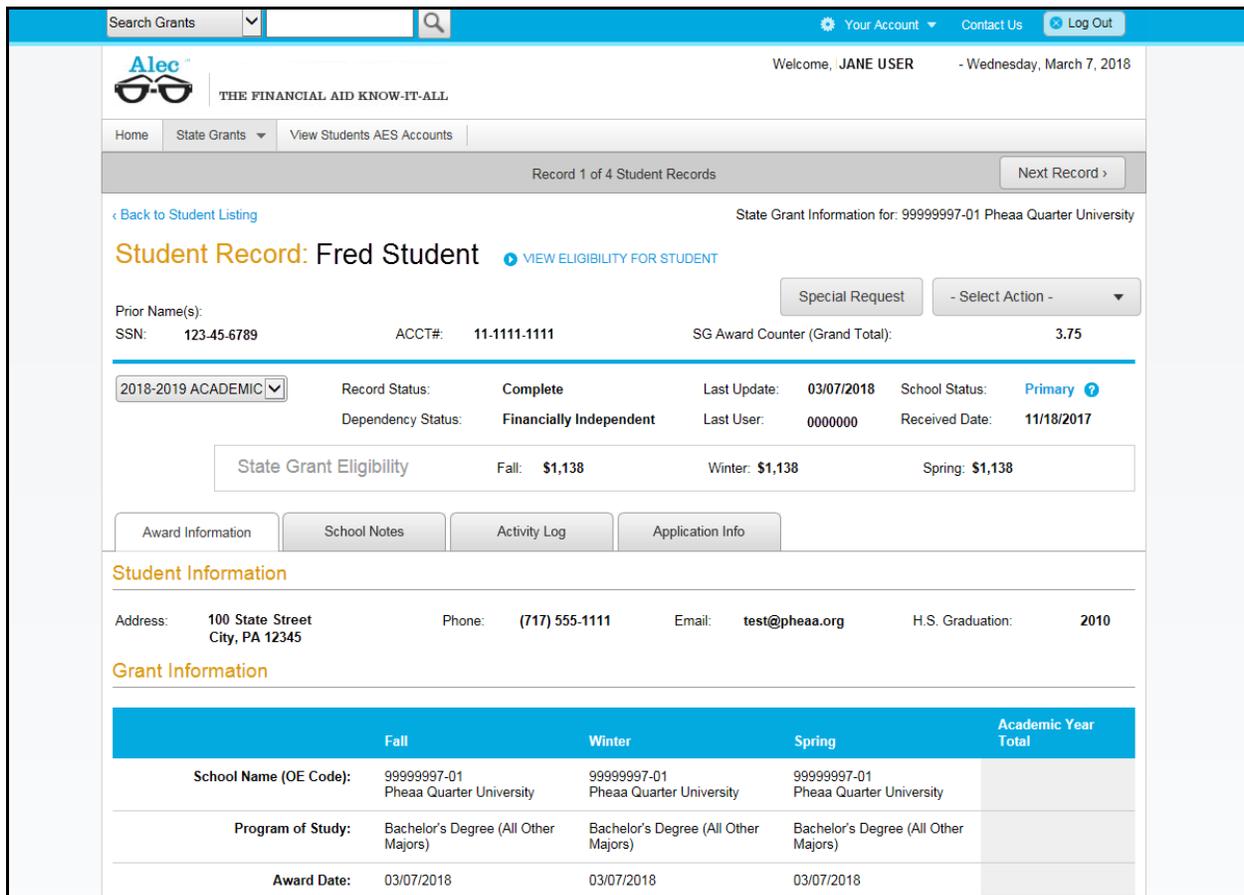
3. Check **Remove Adjustments** to remove the adjustment. *This is unprotected only when an adjustment was made for a previous update.*
4. In the **School Notes** field, enter comments regarding the update, if necessary. Click **View Previous Comments** to view comments entered for previous updates. 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.*
5. Click the **Submit Changes** button to submit the updates made to the **Award Adjustments** section, or click the **Cancel** button to close the **Award Adjustments** section without submitting the updates.

Submit Special Request

School users can submit special requests to make changes to a student account when the change cannot be made using the Grants Partner Interface. Once submitted, the information entered in the **Special Request** field is written as an open activity to the student’s activity record. Once the request is reviewed and completed by PHEAA, the activity log is closed.

School users can submit a special request from the **Student Record** or from the **Update Record**.

NOTE: Special Requests are reserved as a last resort option to request updates and should not be used in lieu of email.



The screenshot shows the 'Student Record' page for Fred Student. Key information includes:

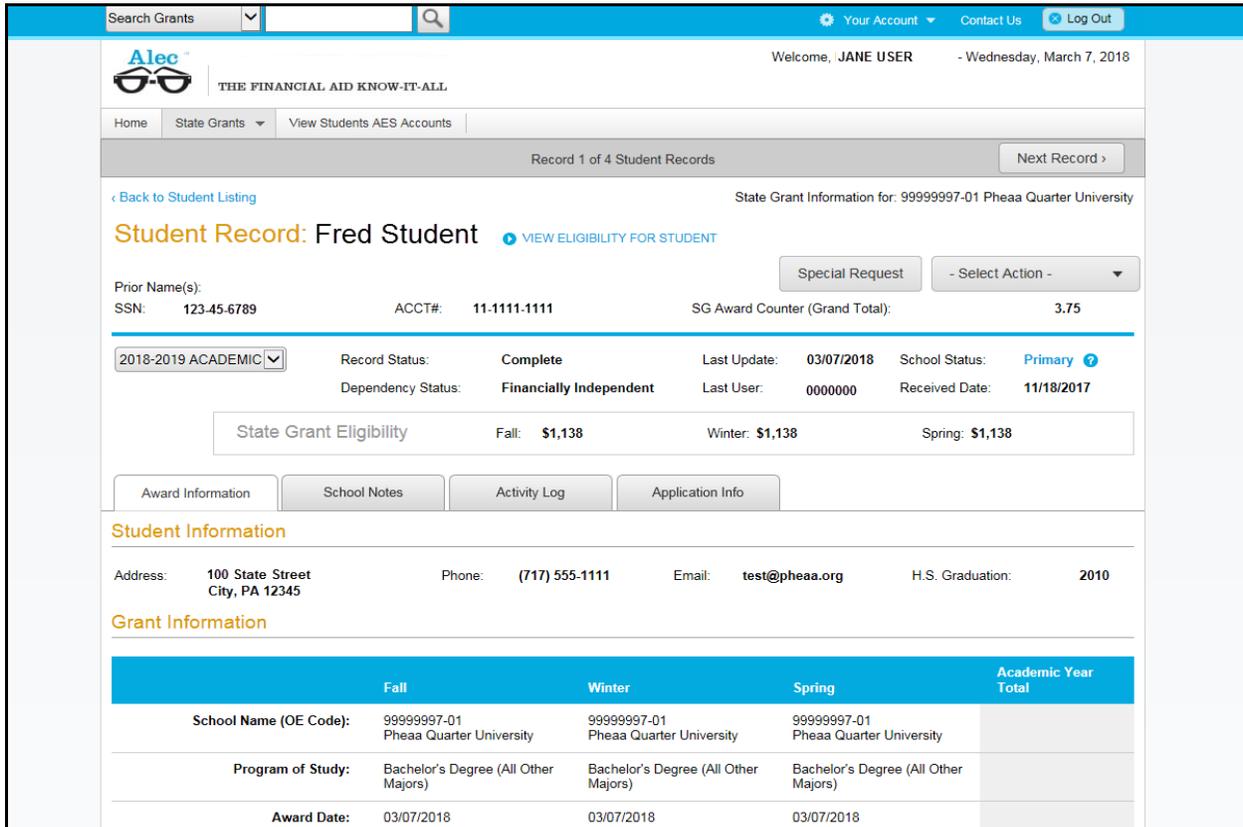
- Student Information:** Address: 100 State Street, City, PA 12345; Phone: (717) 555-1111; Email: test@pheaa.org; H.S. Graduation: 2010.
- Academic Status:** Record Status: Complete; Last Update: 03/07/2018; School Status: Primary.
- Grant Information:** State Grant Eligibility: Fall: \$1,138; Winter: \$1,138; Spring: \$1,138.
- Activity Log:** A table showing award dates and program details for Fall, Winter, and Spring semesters.

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	9999997-01 Pheaa Quarter University	9999997-01 Pheaa Quarter University	9999997-01 Pheaa Quarter University	
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	
Award Date:	03/07/2018	03/07/2018	03/07/2018	

1. To submit a special request, first verify the academic year on the student record or the update record screens. To select a different academic year, click the down arrow and select the academic year.
2. Click **Special Request**.

The **Student Record** page redisplay.

NOTE: The **Student Record** page displays even if the school user accesses the **Special Request** page from the **Update Record** page.



The screenshot shows the 'Student Record' page for Fred Student. The page includes a search bar, user account information, and navigation tabs. The main content area displays student details, record status, and grant eligibility information.

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

Prior Name(s): **Special Request** **- Select Action -**

SSN: 123-45-6789 ACCT#: 11-1111-1111 SG Award Counter (Grand Total): 3.75

2018-2019 ACADEMIC Record Status: **Complete** Last Update: 03/07/2018 School Status: **Primary**

Dependency Status: **Financially Independent** Last User: 0000000 Received Date: 11/18/2017

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

Student Information

Address: 100 State Street City, PA 12345 Phone: (717) 555-1111 Email: test@pheaa.org H.S. Graduation: 2010

Grant Information

	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	
Award Date:	03/07/2018	03/07/2018	03/07/2018	

School users can view the special request on the Activity Log page. See [Activity Log](#) for more information.

View the State Grants Dashboard

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

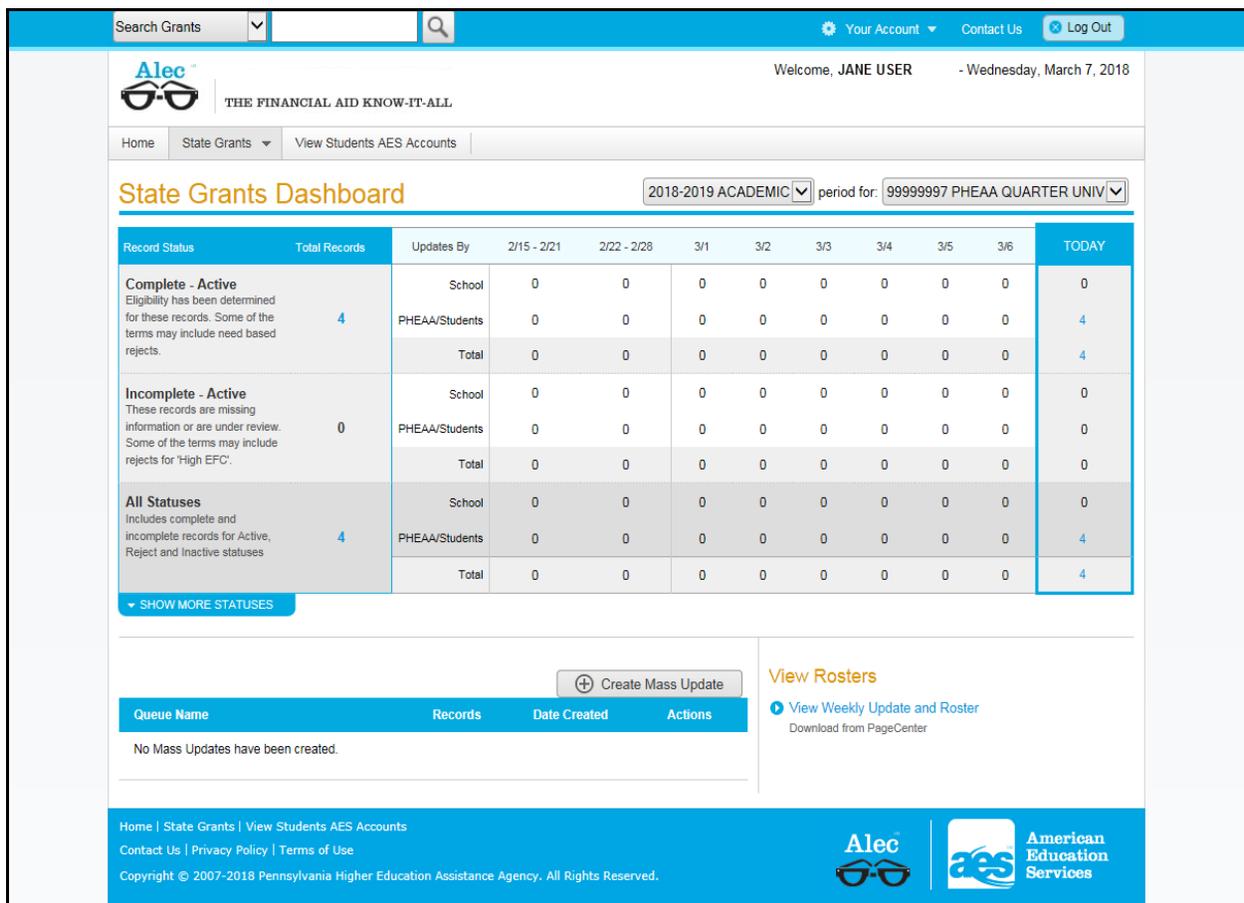
1. Click **View State Grant Dashboard** on the **Home** page or select it from the **State Grants** drop-down list.

The **State Grants Dashboard** displays.

The **Record Status List** displays at the top of the **State Grants Dashboard**. It displays the total of all records in each status and a summary of the student records that were updated within the previous three weeks, beginning with the current date.

Each status on the **Record Status List** is further broken down by the number of student records that were updated by the school and by PHEAA or the student. **Updates by School** indicates that the record was last updated by a school user. **Updates by PHEAA/Students** indicates that the record was last updated by a PHEAA user or program, or that information was received electronically from a student. The **Total** field displays the total of all records in each status and time period.

NOTE: The **State Grants Dashboard** is updated in real time.



The screenshot shows the 'State Grants Dashboard' interface. At the top, there is a search bar and user information: 'Welcome, JANE USER - Wednesday, March 7, 2018'. Below the navigation bar, the dashboard title is 'State Grants Dashboard' with filters for '2018-2019 ACADEMIC' and '99999997 PHEAA QUARTER UNIV'. The main content is a table with the following data:

Record Status	Total Records	Updates By	2/15 - 2/21	2/22 - 2/28	3/1	3/2	3/3	3/4	3/5	3/6	TODAY
Complete - Active Eligibility has been determined for these records. Some of the terms may include need based rejects.	4	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	0	0	0	0	4
		Total	0	0	0	0	0	0	0	0	4
Incomplete - Active These records are missing information or are under review. Some of the terms may include rejects for 'High EFC'.	0	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	0	0	0	0	0
		Total	0	0	0	0	0	0	0	0	0
All Statuses Includes complete and incomplete records for Active, Reject and Inactive statuses	4	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	0	0	0	0	4
		Total	0	0	0	0	0	0	0	0	4

Below the table, there is a 'SHOW MORE STATUSES' button. To the right, there is a 'View Rosters' section with a link to 'View Weekly Update and Roster' and a note 'Download from PageCenter'. At the bottom, there is a 'Create Mass Update' button and a table with columns 'Queue Name', 'Records', 'Date Created', and 'Actions'. The table currently shows 'No Mass Updates have been created.'

- 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.

School Portal State Grant Partner Interface

3. To view a summary for a different branch, click the down arrow in the school field to select a new branch.
4. The **Record Status List** is collapsed when the **State Grants Dashboard** displays. Click **SHOW MORE STATUSES** to expand the **Record Status List** to show more statuses.

The following statuses display in the **Record Status List**.

- The **Complete – Active** status includes records that have been awarded, cancelled or that are ineligible for the following reasons: **No Need (M)**, **Maximum Number of Payments (Y)** and **High EFC (E)**.
 - The **Incomplete – Active** status includes records that are missing information or are under review. This may include reason, **High EFC (E)**.
 - The **Complete – Reject** status includes records that are ineligible for a reason other than financial need for at least one term.
 - The **Incomplete – Reject** status includes records that are ineligible for a reason other than financial need for at least one term and are missing information or are under review.
 - The **Complete – Inactive** status includes records that have been declared inactive by PHEAA.
 - The **Incomplete – Inactive** status includes records that have been declared inactive by PHEAA and information is incomplete.
 - The **All Statuses** status includes complete and incomplete records for active, reject and inactive statuses.
5. If one or more records exist for a status and time period, the number of records displays as a link in the **Record Status List**. Click the link in the **Record Status List** and select one of the following options from the drop-down list:
 - **View Records List**. Select this option to view the student record details for a status or time period. See [View the State Grant Records Student List](#).
 - **Process Records Individually**. Select this option to cycle through student records for a status or time period. See [View Student Records](#). *This option is not available for **All Statuses**.*
 - **Export Records List**. Select this option to export records in a particular status or time period. See [Export Student Records](#).

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

In addition to the **Record Status List**, the **Process State Grants Mass Update** and **View Rosters** sections display at the bottom of the **State Grants Dashboard**.



School Portal State Grant Partner Interface

The **Process State Grants Mass Update** section displays a list of saved mass update queues. School users can click the **Create Mass Update** button to create a queue, the **Edit** button to edit the update criteria, the **Process** button to process the queue, or the **Delete** button to delete the queue. See [Create Mass Update Queues](#) for more information.

The **View Rosters** section displays a quick link to view the weekly update report and rosters on PageCenter.

View the State Grant Records Student List

The **State Grant Records Student List** displays when a school user selects **View Records List** in the **Record Status List** on the **State Grants Dashboard**. It displays in two panes: an abbreviated summary of the **State Grants Dashboard**, left; and a list of student records in the selected status, right. Options are available in the **Filter Records** section to filter and sort the records in the **Student List**.

NOTE: This section describes the State Grant Record student list for years 2018-19 and forward. To filter the list of records for years prior to 2018-19, refer to the [View the State Grant Records Student List for Years Prior to 2018-19](#) section in this document.

The screenshot shows the 'State Grant Records' interface. On the left, there is a summary of record statuses: Complete - Active (4), Incomplete - Active (0), Complete - Reject (0), Incomplete - Reject (0), Complete - Inactive (0), Incomplete - Inactive (0), and All Statuses (4). The main area features a 'Filter Records' section with 'Record Level Filters' (Updated By: PHEAA/Student, Updated When: 3/7, Special Conditions: - Select -) and 'Term Level Filters' (Meets ANY of the following Terms: Fall, Winter, Spring; Eligibility Date: From: , To: ; Reject Types: - Select -; Eligibility Status: - Select -; Enrollment Mode: - Select -; Housing Status: - Select -). Below the filters, there are dropdown menus for Enrollment Status (1-4) and Cancellation Reasons (A-E). The results show 4 records. At the bottom, there is a table of student records with columns for Name/Address, SSN, Award Counter, and Academic Year Total (Fall, Winter, Spring).

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
STUDENT, FRED FORMULADETERMINATION CITY, PA 12345	123456789	3.75	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$3414
STUDENT, GINNY STUDENT IS INDEP-130 L HARRISBURG, PA 17102	123456780	1.00	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$3414
STUDENT, LILY DEP NEEDS 25D LTR 130 CODE J HARRISBURG, PA 17102	123456777	1.00	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$3414
STUDENT, STUART WEB FORM ELIG - PARA 2.D HARRISBURG, PA 17777777	123451234	1.00	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$3414

School Portal State Grant Partner Interface

1. To view a summary and a list of student records for the same time period in a different academic year or summer period, click the down arrow in the academic year field to select the academic year to display.
2. To view a summary and a list of student records for the same academic year or summer period but for a different branch, click the down arrow in the school field to select the branch.
3. To view a summary and a list of student records with a different status, click the status in the summary pane on the left side of the dashboard.

NOTE: Only statuses with at least one updated record may be selected.

Record-level and term-level filters are available to filter the list of student records further.

NOTE: When selected, filters are applied only to the records in the selected status. Select the status from the status list before applying filters.

The record-level filters filter the list of student records by record information.

4. Click the down arrow in the **Updated By** field and select one of the following to indicate who updated the record.
 - **School** – indicates that the record was last updated by a school user
 - **PHEAA/Student** – indicates that the record was last updated by a PHEAA user or program, or that information was received electronically from a student
 - **School/PHEAA/Student** – total of all updates for the school, PHEAA and the student
5. Click the down arrow in the **Updated When** field and select a date from the drop-down list to indicate when the updates were made. This list includes the previous three weeks beginning with the current date.
6. Check one or more status in the **Record Status** field. *This field displays when All Statuses is selected.*
7. Click the down arrow in the **Special Conditions** field and select one of the following special conditions from the drop-down list. *This field displays when ALL STATUSES, Complete-Active or Complete-Reject are selected.*
 - **Collectibles** – Records for which PHEAA is collecting a State Grant award directly from the student. These records are sorted at the beginning of disbursement rosters. A special message displays on the Student Record when a collectible exists.
 - **Validation Processing** – Records that have been completed or canceled for PHEAA's Income Validation.
 - **Late Processing** – Records where the student filed past the deadline but PHEAA extended the deadline for all students and reprocessed the student as on-time. For example, in 2012-13,

School Portal State Grant Partner Interface

PHEAA extended the May 1, 2012 deadline to June 12, 2012 and the August 1, 2012 deadline to September 12, 2012.

The term-level filters filter the list of student records by term information.

8. In the **Term Level Filters** down arrow field, select **ANY** to filter data for any of the selected terms or **ALL** to filter data for all of the selected terms. Select **Fall**, **Winter** and/or **Spring**.

NOTE: If no terms are selected, the filter will provide results for all terms.

9. In the **Eligibility Date** field, enter a date range in the **From** and **To** fields to view records for a specific date range where eligibility was determined or an award was canceled or adjusted. Enter the dates in MM/DD/YYYY format.

NOTE: A Help icon displays to the left of the **Eligibility Date** field. Click the icon to display additional information about the eligibility date.

10. Click the down arrow in the **Reject Types** field and select a reject, or ineligibility, reason from the drop-down list.
11. Click the down arrow in the **Eligibility Status** field and select one of the following eligibility statuses from the drop-down list.
 - **Awarded** – Records that have an award greater than zero in the term or terms being filtered
 - **Reject** – Records that have an ineligibility reason in the term or terms being filtered
 - **Cancelled** – Records that have been canceled and have an award of zero in the term or terms being filtered. Results will show any cancellation reason
 - **Pending** – Records that are pending eligibility determination in the term or terms being filtered
12. Click the down arrow in the **Enrollment Mode** field and select the percentage of classroom and/or distance education instruction from the drop-down list.
13. Click the down arrow in the **Housing Status** field and select a housing status from the drop-down list.
14. In the **Enrollment Status** field select one or more enrollment statuses.
15. In the **Cancellation Reasons** field, select one or more cancellation reasons.
16. In the **Program of Study** field, select one or more programs of study. Programs of study do not display when All Schools is selected. This field is dynamic and displays choices based on the school and/or branch campus that was selected.

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

The **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 1 – 4 out of 4 Student Records.**

The screenshot shows the 'State Grant Records' interface. On the left, there is a sidebar with status filters: Complete - Active (4), Incomplete - Active (0), Complete - Reject (0), Incomplete - Reject (0), Complete - Inactive (0), Incomplete - Inactive (0), and All Statuses (4). The main area is titled 'Filter Records' and contains several filter sections: 'Record Level Filters' (Updated By: School/PHEAA/Student, Updated When: 3/7), 'Special Conditions' (Select), 'Term Level Filters' (Meets ANY of the following Terms: Fall, Winter, Spring), 'Eligibility Date' (From/To), 'Reject Types' (Select), 'Eligibility Status' (Select), 'Enrollment Mode' (Select), 'Housing Status' (3 - Off Campus), 'Enrollment Status' (1 - Full Time Student, 2 - Full Time-Evening, 3 - Half-time Student, 4 - Less Than Half-Time), 'Cancellation Reasons' (A - Graduated from a Bachelor's, B - Not a High School Graduate, D - Death of Student, E - Cancelled due to Agency Errc), and 'Program of Study' (A - 5 Year Co-op Work-Study (All), B - Bachelor's Degree (Religion 1), C - Bachelor's Degree (All Other), F - 5 Yr Bona Fide Program). Below the filters, it says 'Results: 1 Records'. At the bottom, there is a table with one record:

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
STUDENT, FRED FORMULADETERMINATION CITY, PA 12345	123456789	3.58	\$1138 Full Time Student Off Campus	\$1138 Full Time Student Off Campus	\$569 Half-time Student Off Campus	\$2845

The **Name/Address** field displays the student’s name and address on the most recent student record, which may not be the same as the academic year selected.

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

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

The **Award Counter** field displays the total number of terms for all years for which the student has received a State Grant award.

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

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

18. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Student Records](#) for more information.

NOTE: The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the Search box at that 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.

19. Click the **Export to Excel/CSV** button to export the student list. See [Export Student Records](#) for step-by-step instructions.
20. Click the **Go to First Record** button to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. See [View Student Records](#) for more information.
21. To select one or more records to add to a new mass update queue, check the boxes to the left of the **Name/Address** field. To select all records on the page, check the box in the header.

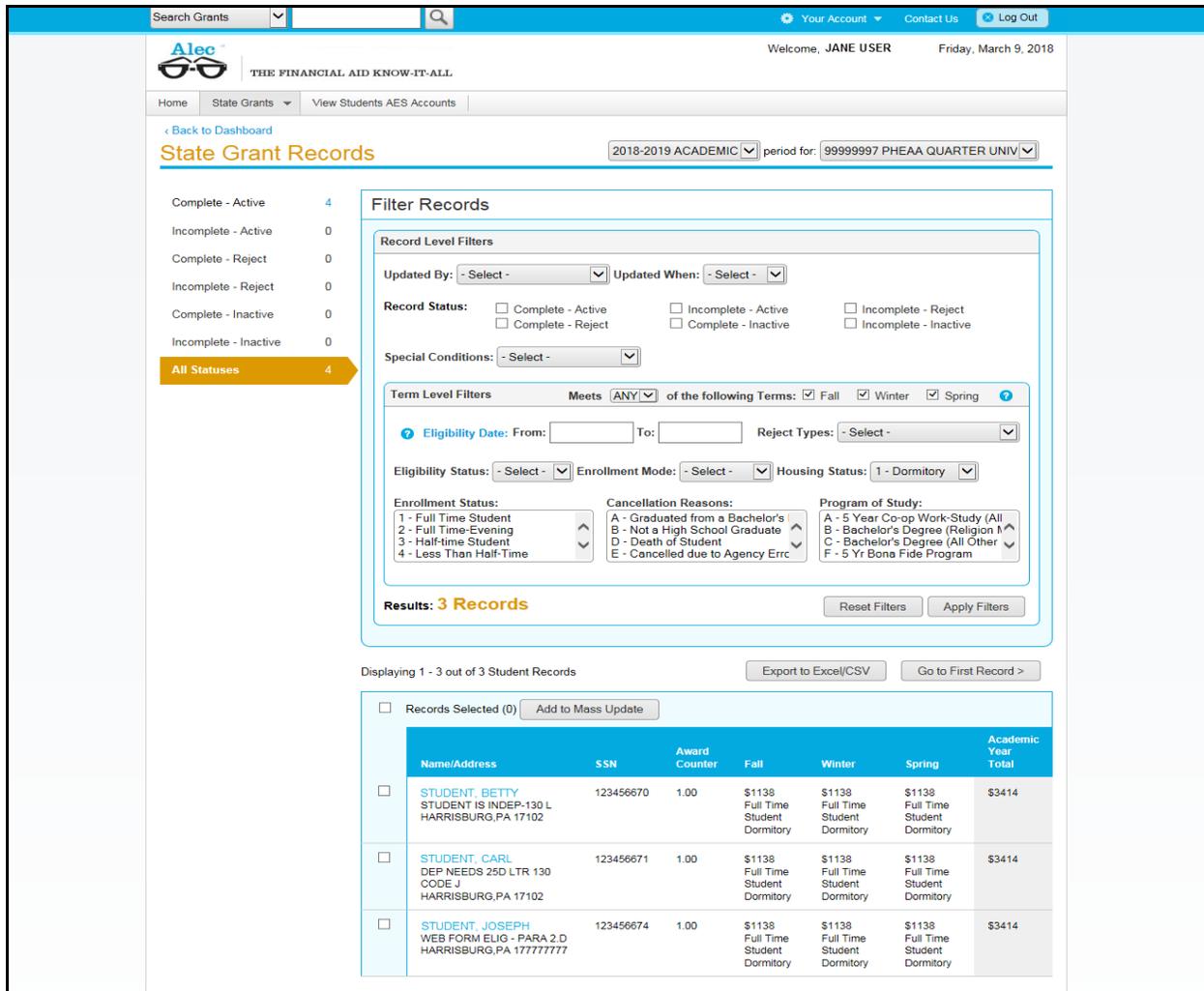
NOTE: The **Student List** displays 20 records per page. A maximum of 100 records may be added to a mass update queue. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records. In some cases, a record cannot be updated by a school user. It cannot be checked even if the school user checks the box in the header to select all records.

22. Click the **Add to Mass Update** button to add the selected record(s) to a new mass update queue. See [Create Mass Update Queues](#) 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.

Export Student Records

School users can export student records from the Student List or from the State Grant Dashboard. Records are exported to an Excel spreadsheet or Comma Separated Value (CSV) file. In this example, student records are exported from the Student List.



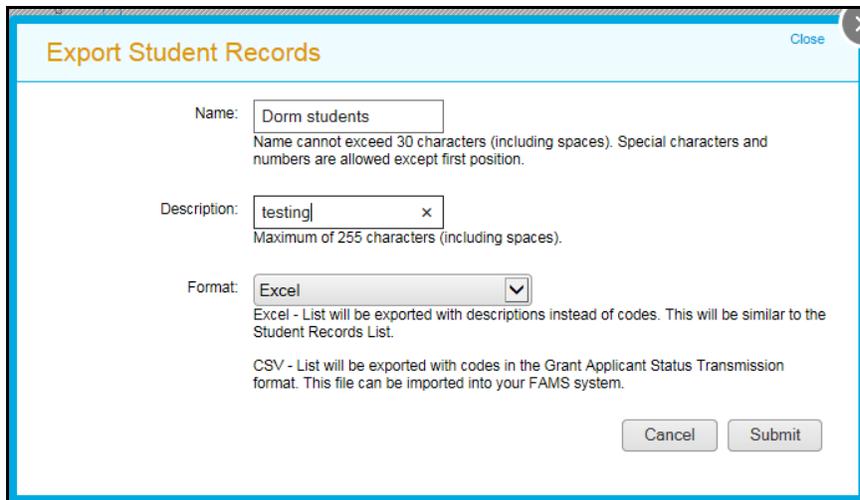
The screenshot shows the 'State Grant Records' interface. On the left, there is a sidebar with status filters: Complete - Active (4), Incomplete - Active (0), Complete - Reject (0), Incomplete - Reject (0), Complete - Inactive (0), Incomplete - Inactive (0), and All Statuses (4). The main area features a 'Filter Records' section with various dropdowns and checkboxes for Record Level Filters, Term Level Filters, Eligibility Date, Eligibility Status, Enrollment Mode, Housing Status, Enrollment Status, Cancellation Reasons, and Program of Study. Below the filters, it shows 'Results: 3 Records' and an 'Export to Excel/CSV' button. A table displays the following data:

	Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
<input type="checkbox"/>	STUDENT, BETTY STUDENT IS INDEP-130 L HARRISBURG, PA 17102	123456670	1.00	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$3414
<input type="checkbox"/>	STUDENT, CARL DEP NEEDS 25D LTR 130 CODE J HARRISBURG, PA 17102	123456671	1.00	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$3414
<input type="checkbox"/>	STUDENT, JOSEPH WEB FORM ELIG - PARA 2 D HARRISBURG, PA 17777777	123456674	1.00	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$1138 Full Time Student Dormitory	\$3414

- To export the entire student list, click **Export to Excel/CSV**.

NOTE: Do not select individual records as the entire student list is exported. Selection boxes are used only to add students to mass update queues. See [Create Mass Update Queues](#) for step-by-step instructions.

The **Export Student Records** pop-up screen displays.



Export Student Records Close

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

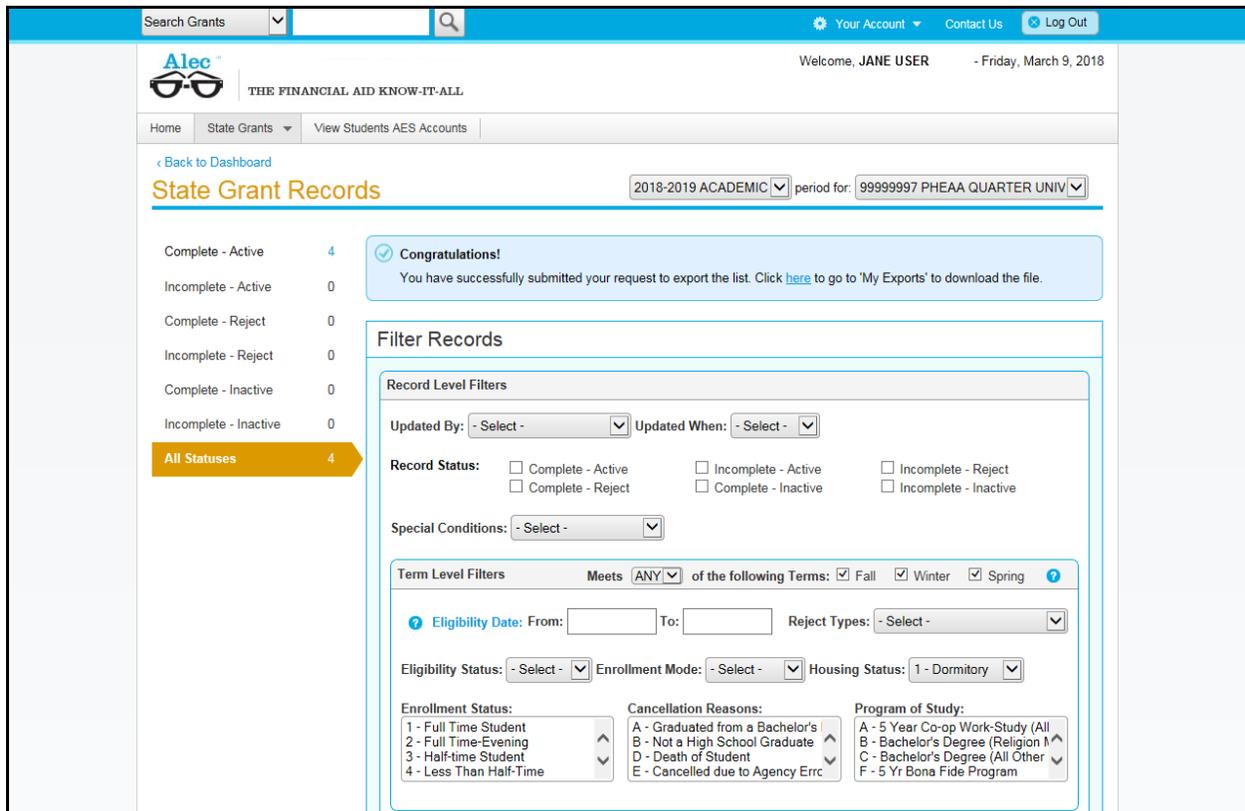
Description: x
Maximum of 255 characters (including spaces).

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

2. In the **Name** field, enter the name of the export file using the guidelines below the field.
3. In the **Description** field, enter a description of the export using the guidelines below the field.
4. Click the down arrow in the **Format** field and select **Excel** or **CSV** from the drop down list. A description of each format displays below the field. The CSV format opens in Excel and uses code values in fields for use in automated processing. The Excel format uses English descriptions instead of codes.
5. Click **Submit** to export the student records, or click **Cancel** to cancel the export.

School Portal State Grant Partner Interface

The **State Grants Records** page redisplay with a message that the export was successful. The message contains and a link to the My Exports page to download the file.



The screenshot shows the 'State Grant Records' page. At the top, there is a search bar and navigation links for 'Your Account', 'Contact Us', and 'Log Out'. The user is identified as 'JANE USER' on 'Friday, March 9, 2018'. The page title is 'State Grant Records' with a filter for '2018-2019 ACADEMIC' and '99999997 PHEAA QUARTER UNIV'. A 'Congratulations!' message states: 'You have successfully submitted your request to export the list. Click [here](#) to go to 'My Exports' to download the file.' Below this is a 'Filter Records' section with various filters: 'Record Level Filters' (Updated By, Updated When, Record Status, Special Conditions), 'Term Level Filters' (Meets ANY of the following Terms: Fall, Winter, Spring; Eligibility Date, Reject Types, Eligibility Status, Enrollment Mode, Housing Status), and 'Enrollment Status', 'Cancellation Reasons', and 'Program of Study' dropdown menus.

- Click the link in the message box to go to the **My Exports** page, or click **View My Exports** in the **Alerts (Notifications)** box on the State Grants home page, not shown. See [View My Exports](#) for more information.

View My Exports

School users can access the **My Exports** page from the **Home** page or the **State Grants** drop-down list or from the message that displays on the **State Grants Records** page when the student records are exported.

The screenshot shows the Alec State Grants Partner Interface dashboard. At the top, there is a search bar for grants and a user account section with 'Your Account', 'Contact Us', and 'Logout' options. The user is identified as 'JANE USER' on 'Wednesday, March 7, 2018'. The dashboard is organized into several sections:

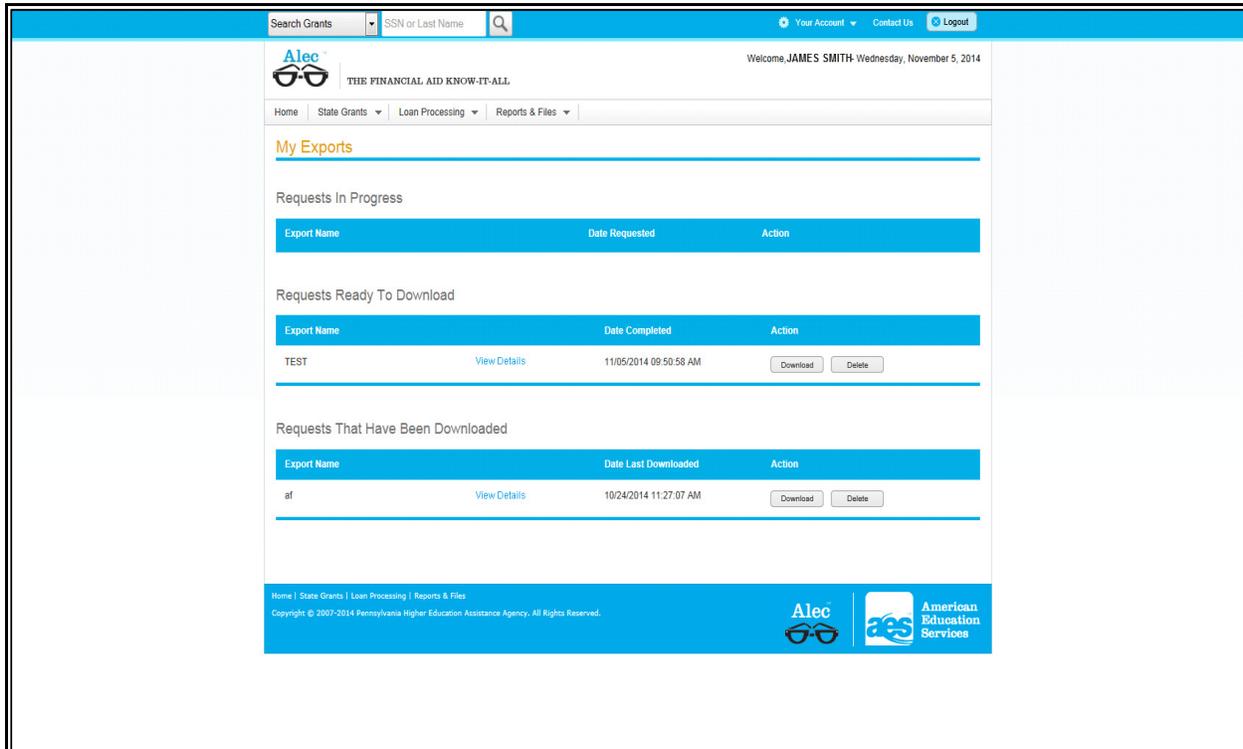
- State Grants:** Contains links for 'View State Grants Dashboard' (Standard Lists and Worklists), 'Create Mass Update Queue' (Create Mass Update Queue), 'State Grant Education Costs' (Education Cost Form), 'Request Primary School Change' (Change Primary School in Student Record), 'View My Exports' (View Exported Student Lists), 'View Weekly Update and Roster' (Download from PageCenter), and 'State Grant Disbursement Certification' (Disbursement Certification Form).
- Loan Processing:** Contains a link for 'View Students AES Accounts' (Account Access).
- Messages:** States 'There are currently no messages'.
- Alerts (Notifications):** States 'You have no alerts.' with a 'View My Exports' link.
- Order Materials:** Includes 'Program Materials' for ordering forms and guides.
- Training & Publications:** Includes links for 'Training Event Schedule', 'Document Library', 'Loan Notes', and 'Common Manual'.
- Default Prevention:** Includes links for 'You Can Deal With It' and 'YCDWI Downloads'.

The footer contains the Alec logo, American Education Services logo, and copyright information: 'Copyright © 2007-2018 Pennsylvania Higher Education Assistance Agency. All Rights Reserved.'

1. Click **View My Exports** on the State Grant home page or drop-down list, or click the link in the **Alerts (Notifications)** box on the right sidebar.

The **My Exports** page displays.

The **My Exports** page is used to view a school user’s exports. It displays exports that are in progress, exports that are ready to download, and exports that have already been downloaded. The export appears under the category corresponding to the export file’s status.



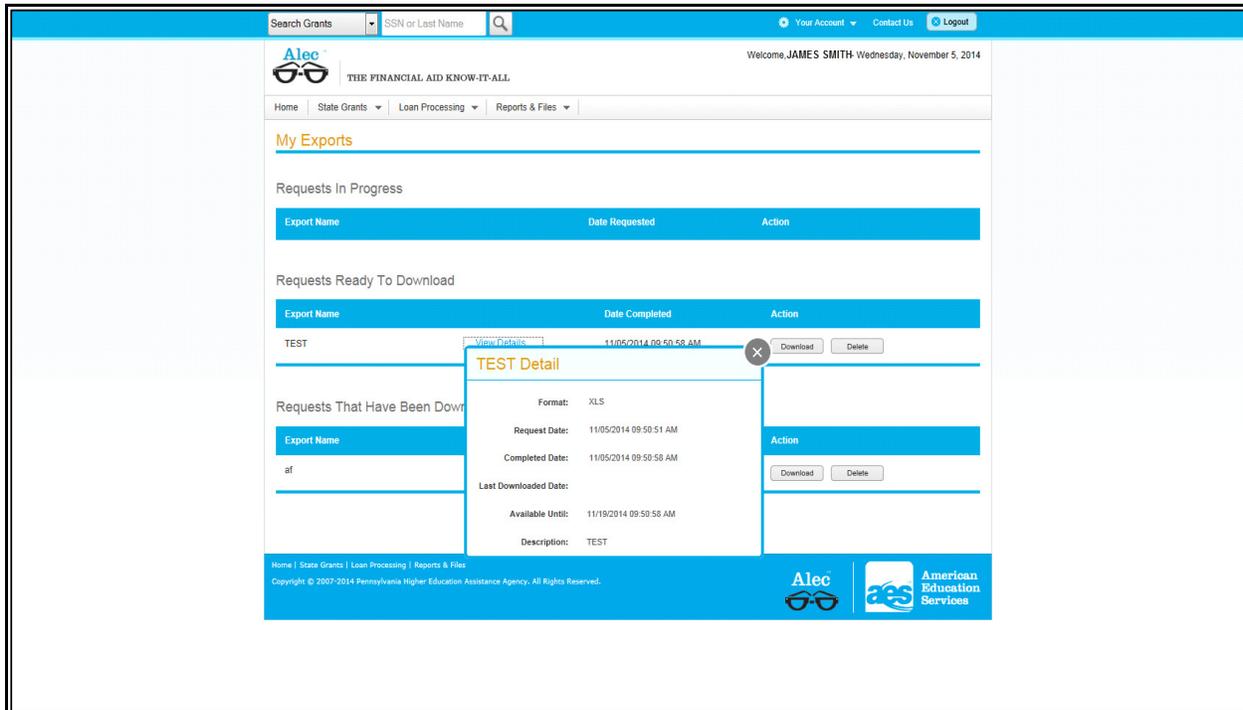
- The **Requests in Progress** category displays exports that are not ready to download and require longer processing time due to the size of the file. To stop processing, click **Cancel**.

NOTE: Currently, the process averages a download time of approximately 200 records per minute. If an export fails to progress to the ready to download stage after the expected time expires, please delete and try again. If the export fails repeatedly, please contact State Grant and Special Programs.

- The **Requests Ready to Download** category displays exports that have been processed and are ready to download. Click **Download** to download the export file, click **Delete** to delete the export file, or click **View Details** to review the export file details.

NOTE: Follow the prompts to download or delete the export file. Once the export file is downloaded, it displays in the **Requests That Have Been Downloaded** category. Users can download, delete or view the details of previously downloaded files using the same instructions in step 2.

The export details dialog box displays if the user selected, **View Details** on the **My Exports** page.



The **Format** field displays the format of the export file, XLS or CSV.

The **Request Date** field displays the date and time the export was requested.

The **Completed Date** field displays the date and time the export was completed.

The **Last Downloaded Date** field displays the date and time the export file was last downloaded.

The **Available Until** field displays the last date and time the export file is available.

The **Description** field displays the description of the export file that was entered by the school user during the export.

Mass Update Queues

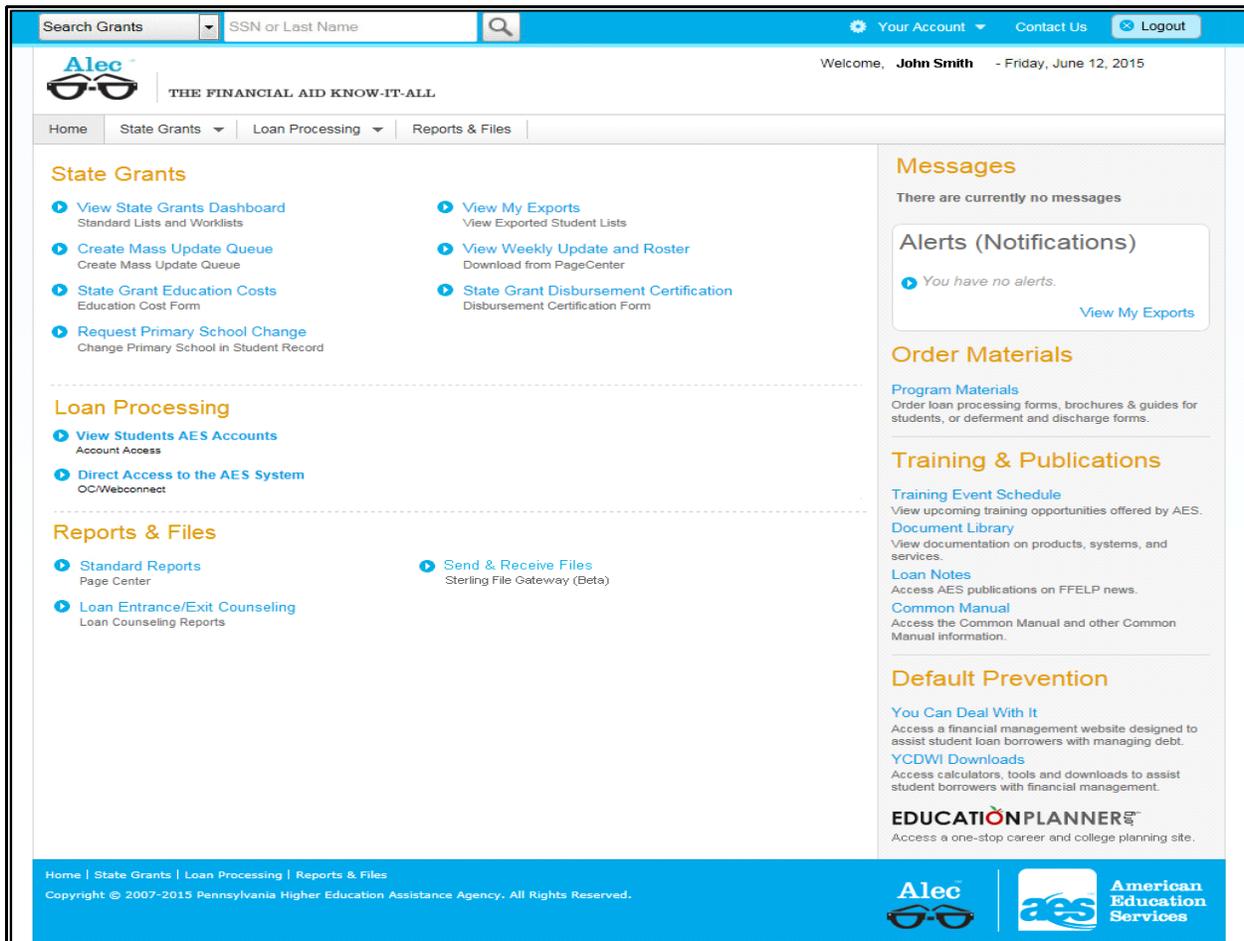
The screenshot displays the PHEAA School Portal State Grant Partner Interface. The top navigation bar includes a search field for grants, user account information for John Smith, and a logout button. The main content area is divided into several sections: State Grants, Loan Processing, Reports & Files, Messages, Alerts (Notifications), Order Materials, Training & Publications, and Default Prevention. The State Grants section contains links for viewing the dashboard, creating mass update queues, education costs, and primary school changes. Loan Processing includes links for AES accounts and direct access to the AES system. Reports & Files offers standard reports and file exchange options. The right sidebar provides messages, alerts, and links to program materials, training, and publications. The footer contains the PHEAA copyright notice and logos for Alec and American Education Services.

Refer to the following sections for more information:

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

Create Mass Update Queues

School users can create mass update queues to update information for more than one student record when certifying eligibility for the Pennsylvania State Grant.

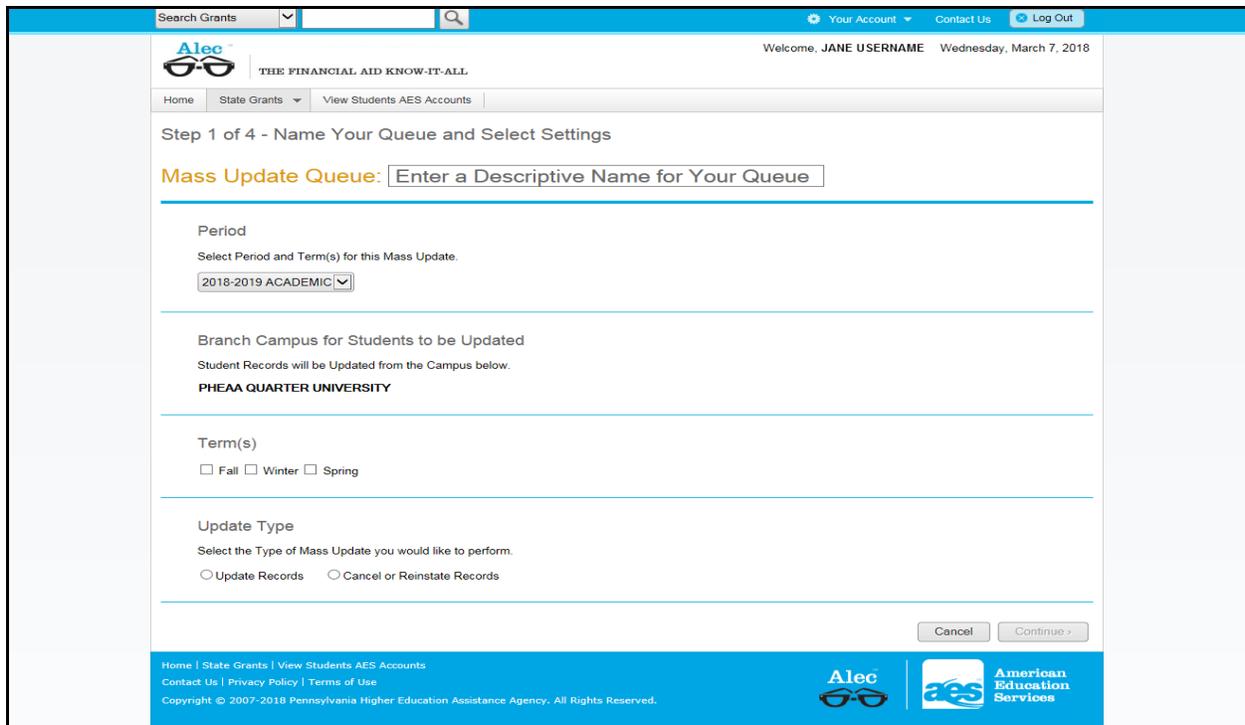


The screenshot displays the Alec School Portal interface. At the top, there is a search bar for grants and a user account section for John Smith. The main navigation bar includes 'Home', 'State Grants', 'Loan Processing', and 'Reports & Files'. The 'State Grants' section is expanded, showing several options: 'View State Grants Dashboard', 'Create Mass Update Queue', 'State Grant Education Costs', 'Request Primary School Change', 'View My Exports', 'View Weekly Update and Roster', and 'State Grant Disbursement Certification'. The 'Loan Processing' section includes 'View Students AES Accounts' and 'Direct Access to the AES System'. The 'Reports & Files' section has 'Standard Reports' and 'Send & Receive Files'. On the right side, there are sections for 'Messages', 'Alerts (Notifications)', 'Order Materials', 'Training & Publications', and 'Default Prevention'. The footer contains the Alec logo, American Education Services logo, and copyright information for the Pennsylvania Higher Education Assistance Agency.

1. Click **Create Mass Update Queue** from the **State Grants Home** page, the **State Grants** drop-down list or on the **State Grants Dashboard**.

NOTE: For academic years prior to 2018-19, refer to the [Create Mass Update Queue for Years Prior to 2018-19](#) section in this document.

The **Step 1 of 4 – Name Your Queue and Select Settings** page displays.



2. In the **Mass Update Queue** field, enter a descriptive name for the queue.
3. In the **Period** field, click the down arrow and select the academic period for the mass update.
4. In the **Branch Campus for Students to be Updated** field, click the down arrow and select the branch campus for which the updates are being made.

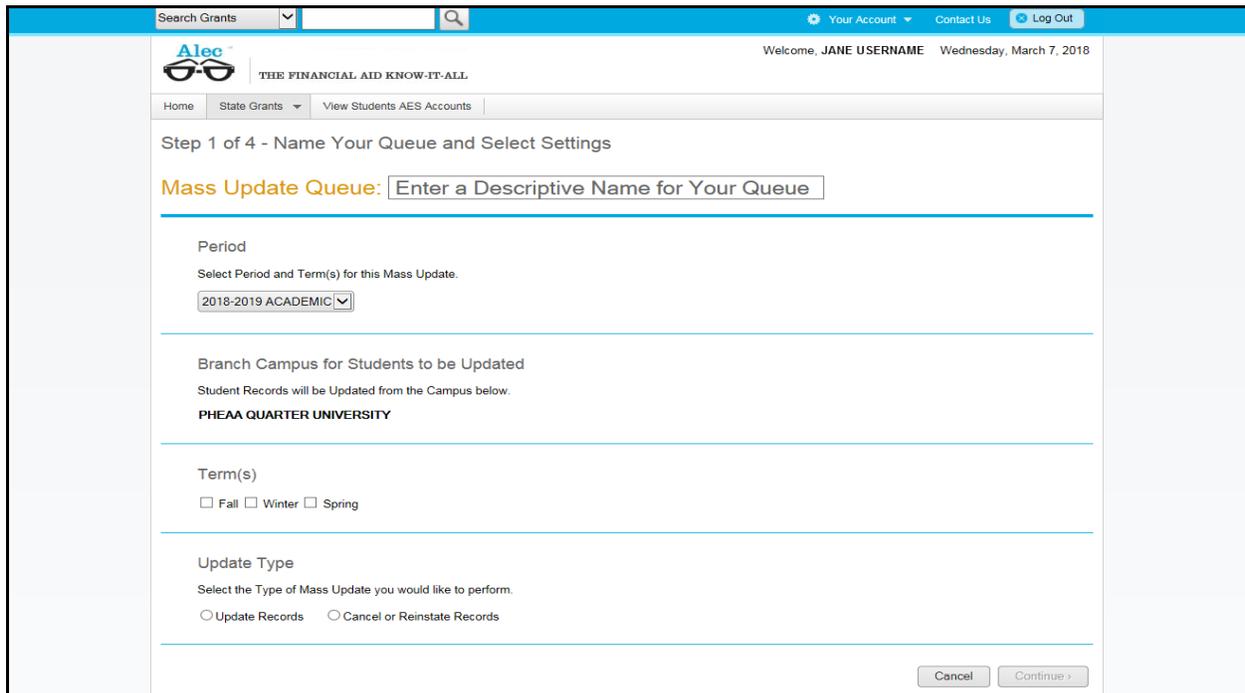
NOTE: The **Branch Campus for Students to be Updated** field displays the school branches or corporate headquarters for which the school user is authorized to make updates. Users with authorization for multiple campuses must make a selection.

5. In the **Term(s)** field, check the term(s) for the mass update.
6. In the **Update Type** field, check **Update Records** or **Cancel or Reinstate Records**. Refer to the [Update Queue](#) and [Cancel or Reinstate Queue](#) sections for more information.

NOTE: The **Ready to Succeed** option displays only for approved schools in the **Update Type** field. Refer to user guide **WB0139-School Portal Ready-to-Succeed Scholarship Partner Interface_User Guide_PHEAA** for more information about the Ready to Succeed programs.

Update Queue

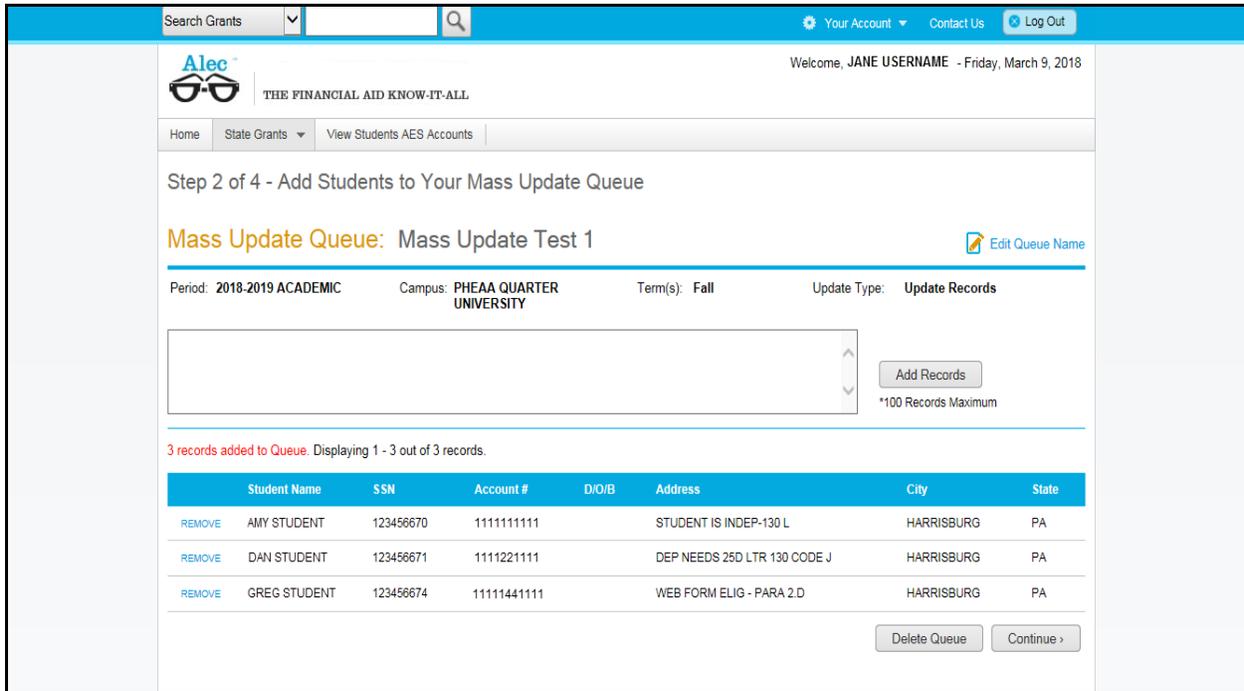
Update Queue is used to update all student records in the queue with the exact same school enrollment or credit information.



The screenshot displays the 'Mass Update Queue' configuration page. At the top, there is a search bar for grants and user account options. The main content area is titled 'Step 1 of 4 - Name Your Queue and Select Settings'. It includes a text input field for 'Mass Update Queue' with a placeholder 'Enter a Descriptive Name for Your Queue'. Below this are sections for 'Period' (a dropdown menu set to '2018-2019 ACADEMIC'), 'Branch Campus for Students to be Updated' (a dropdown menu set to 'PHEAA QUARTER UNIVERSITY'), 'Term(s)' (checkboxes for 'Fall', 'Winter', and 'Spring'), and 'Update Type' (radio buttons for 'Update Records' and 'Cancel or Reinststate Records'). 'Cancel' and 'Continue' buttons are located at the bottom right.

1. In the **Update Type** field, select **Update Records**.
2. Click the **Continue** button.

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



Search Grants [] []

Your Account [] Contact Us [] Log Out []

Welcome, JANE USERNAME - Friday, March 9, 2018

Alec THE FINANCIAL AID KNOW-IT-ALL

Home State Grants [] View Students AES Accounts []

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

Mass Update Queue: Mass Update Test 1 [Edit Queue Name](#)

Period: 2018-2019 ACADEMIC Campus: PHEAA QUARTER UNIVERSITY Term(s): Fall Update Type: Update Records

[] Add Records *100 Records Maximum

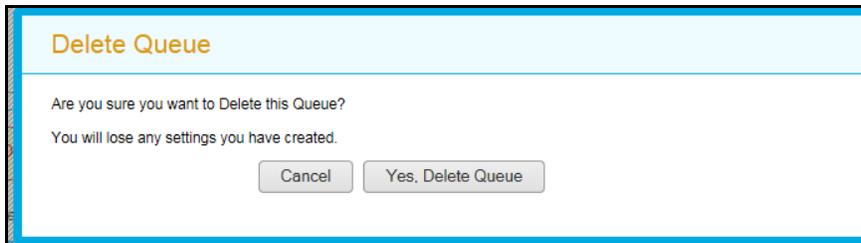
3 records added to Queue. Displaying 1 - 3 out of 3 records.

	Student Name	SSN	Account #	D/O/B	Address	City	State
REMOVE	AMY STUDENT	123456670	1111111111		STUDENT IS INDEP-130 L	HARRISBURG	PA
REMOVE	DAN STUDENT	123456671	1111221111		DEP NEEDS 25D LTR 130 CODE J	HARRISBURG	PA
REMOVE	GREG STUDENT	123456674	1111144111		WEB FORM ELIG - PARA 2.D	HARRISBURG	PA

[Delete Queue](#) [Continue >](#)

- To remove records, click the **REMOVE** link to the left of the student record.
- Click the **Continue** button. To delete the queue, click the **Delete Queue** button.

NOTE: If the school user clicks **Delete Queue**, the **Delete Queue** dialog box displays. Click the **Yes, Delete Queue** button to confirm the deletion.

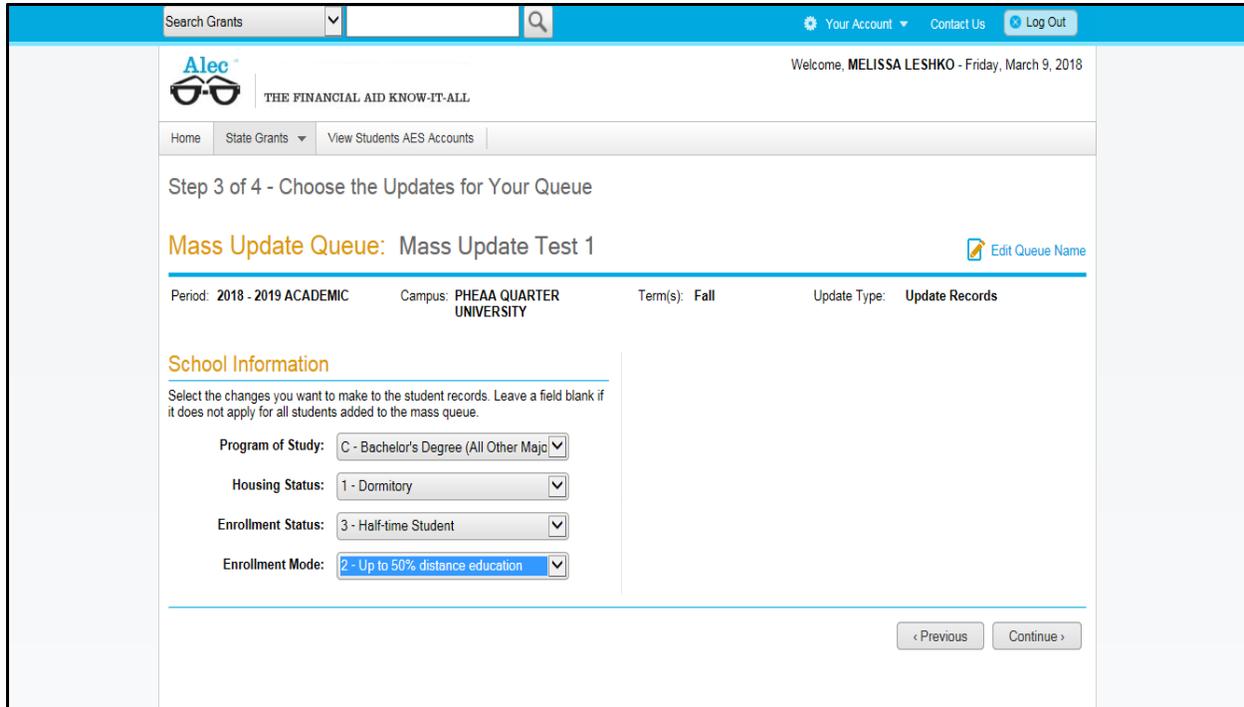


Delete Queue

Are you sure you want to Delete this Queue?
You will lose any settings you have created.

[Cancel](#) [Yes, Delete Queue](#)

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 the **Edit Queue Name** link.

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

Updates can be made to school enrollment information.

School Information

7. In the **Branch Campus Change** field, click the down arrow and select the new branch campus.

NOTE: The **Branch Campus Change** field displays only if the school has more than one branch or corporate headquarters and the school user is authorized to make updates. Users with authorization for multiple campuses may make a selection.

8. In the **Program of Study** field, click the down arrow and select a program of study.
9. In the **Housing Status** field, click the down arrow and select a housing status.

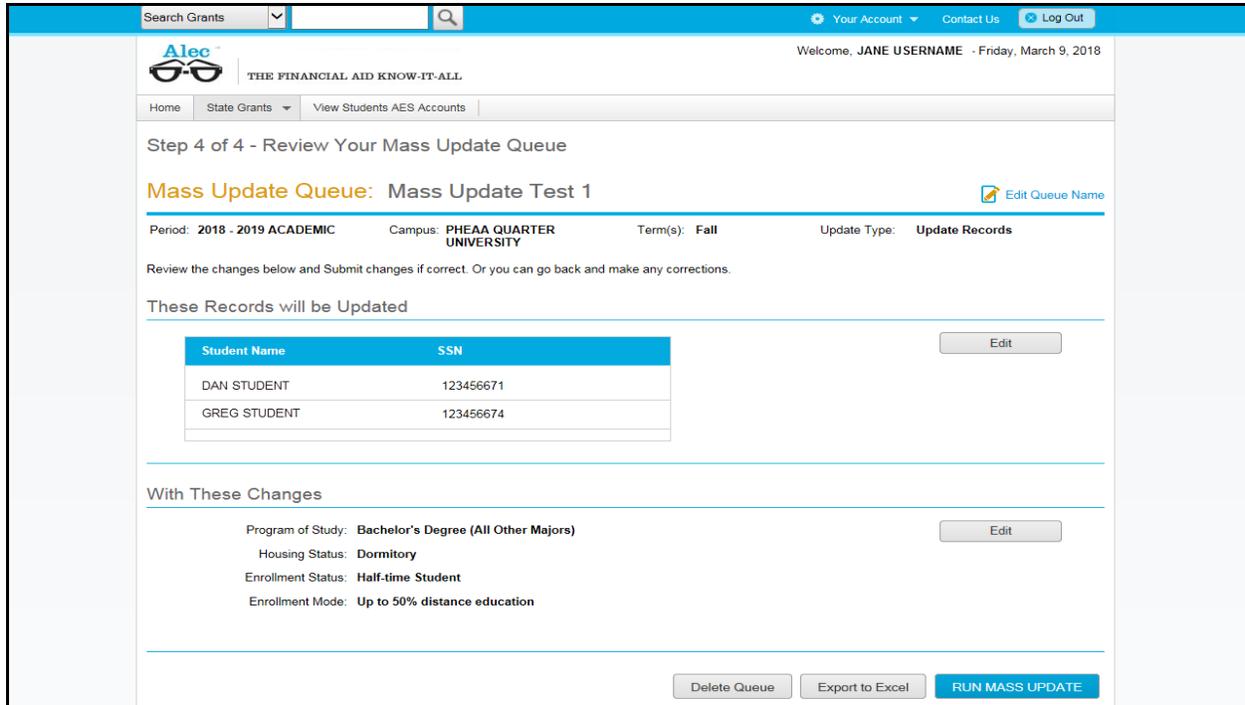
School Portal State Grant Partner Interface

10. In the **Enrollment Status** field, click the down arrow and select an enrollment status.
11. In the **Enrollment Mode** field, click the down arrow and select the percentage of the student's classroom or distance education enrollment from the drop-down list.

NOTE: If the **Program of Study** field selection is **Distance Education**, then the **Enrollment Mode** field is protected.

12. Click the **Previous** button to return to step two, or click the **Continue** button.

The **Step 4 of 4 – Review Your Mass Update 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, School, Campus, Term(s)** and **Update Type** fields display the information that was entered on the previous page.

The **These Records will be Updated** section displays a list of student names and SSNs that will be updated.

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

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

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

15. To delete the queue, click the **Delete Queue** button.

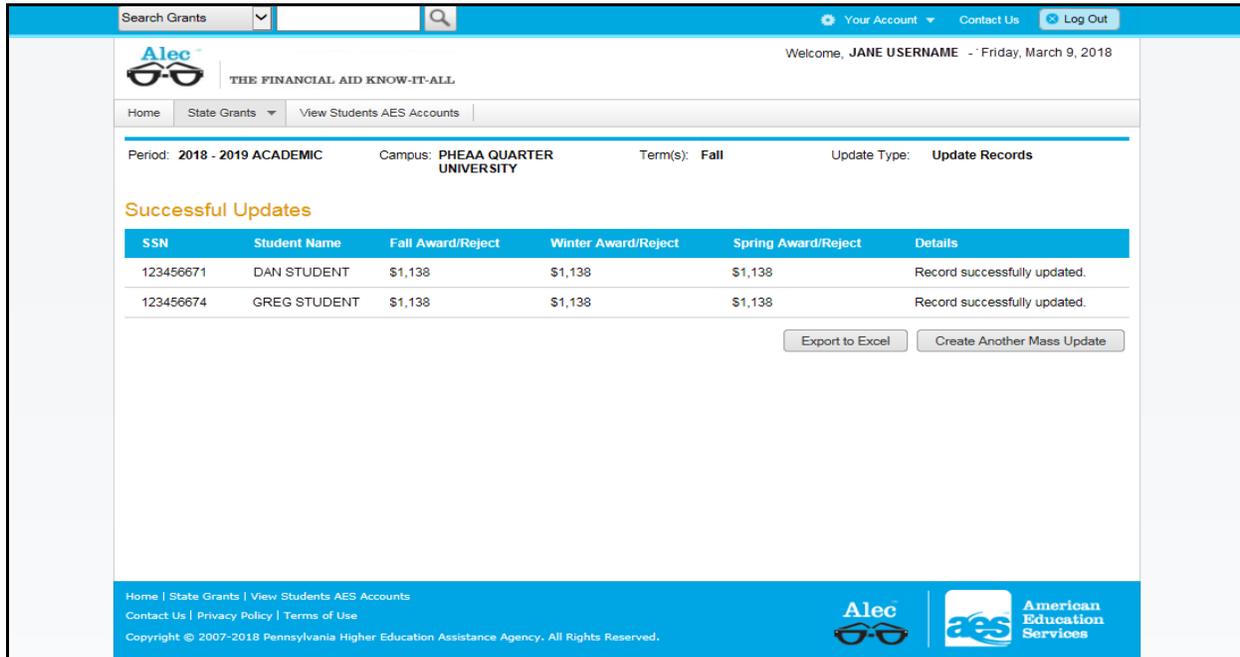
NOTE: A confirmation box, not shown, displays if the school user clicks **Delete Queue**. Click **Yes, Delete Queue** to delete the queue.

School Portal State Grant Partner Interface

16. Click the **Export to Excel** button to export the update criteria to an Excel spreadsheet. See [Appendix B - Export Mass Update Reports to Excel](#) for more information.
17. Click the **Run Mass Update** button 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, he or she will not be able to return to view the results.



The screenshot shows the PHEAA School Portal State Grant Partner Interface. At the top, there is a search bar and navigation links for 'Your Account', 'Contact Us', and 'Log Out'. The user is logged in as 'JANE USERNAME' on Friday, March 9, 2018. The page title is 'THE FINANCIAL AID KNOW-IT-ALL'. Below the title, there are navigation tabs for 'Home', 'State Grants', and 'View Students AES Accounts'. The main content area displays the following information:

- Period: 2018 - 2019 ACADEMIC
- Campus: PHEAA QUARTER UNIVERSITY
- Term(s): Fall
- Update Type: Update Records

Below this information, there is a section titled 'Successful Updates' which contains a table with the following data:

SSN	Student Name	Fall Award/Reject	Winter Award/Reject	Spring Award/Reject	Details
123456671	DAN STUDENT	\$1,138	\$1,138	\$1,138	Record successfully updated.
123456674	GREG STUDENT	\$1,138	\$1,138	\$1,138	Record successfully updated.

At the bottom of the table, there are two buttons: 'Export to Excel' and 'Create Another Mass Update'. The footer of the page includes navigation links, contact information, and logos for Alec and American Education Services.

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

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, not shown, 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, not shown, 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.

18. Click the **View Records Individually** link, not shown, to cycle through the records that have not been updated successfully.

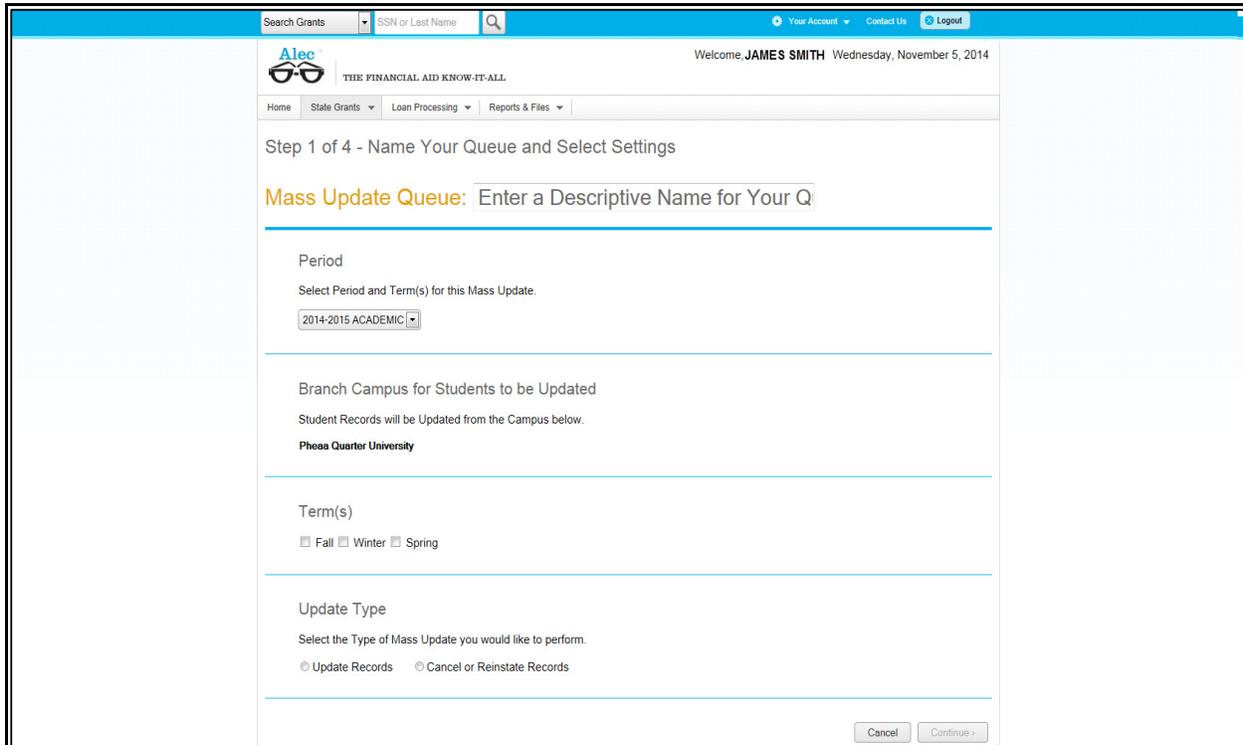
19. Click the **Export to Excel** button to export the mass update report to an Excel spreadsheet. See [Appendix B - Export Mass Update Reports to Excel](#) for more information.

School Portal State Grant Partner Interface

20. Click the **Create Another Mass Update** button to create another mass update queue using the instructions in this section.

Cancel or Reinstate Queue

Cancel or Reinstate Queues are used to update student records with cancellations or to reinstate awards. Cancellations include not enrolled, graduated and rejections for not making satisfactory academic progress. Reinstatements reverse those cancellations and reject reasons.



Search Grants | SSN or Last Name | Your Account | Contact Us | Logout

Welcome, JAMES SMITH | Wednesday, November 5, 2014

Alec THE FINANCIAL AID KNOW-IT-ALL

Home | State Grants | Loan Processing | Reports & Files

Step 1 of 4 - Name Your Queue and Select Settings

Mass Update Queue: Enter a Descriptive Name for Your Q

Period
Select Period and Term(s) for this Mass Update.
2014-2015 ACADEMIC

Branch Campus for Students to be Updated
Student Records will be Updated from the Campus below.
Pheaa Quarter University

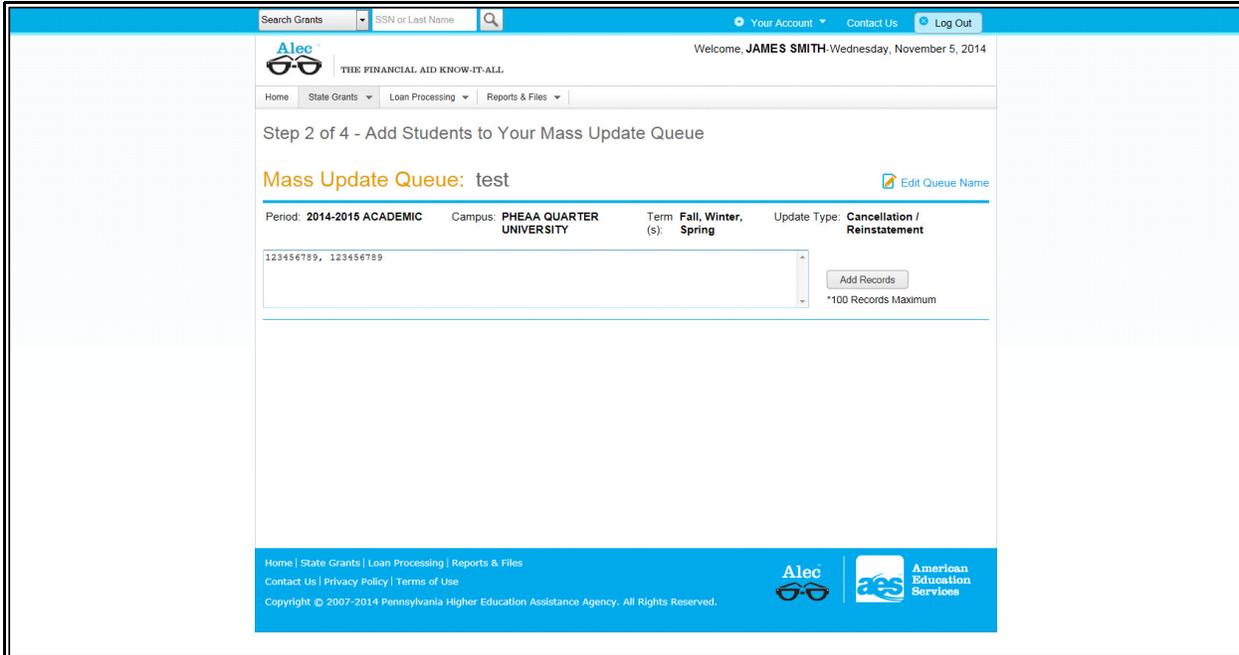
Term(s)
 Fall Winter Spring

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

Cancel | Continue >

1. In the **Update Type** field, click **Cancel** or **Reinstate Records**.
2. Click **Continue**.

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

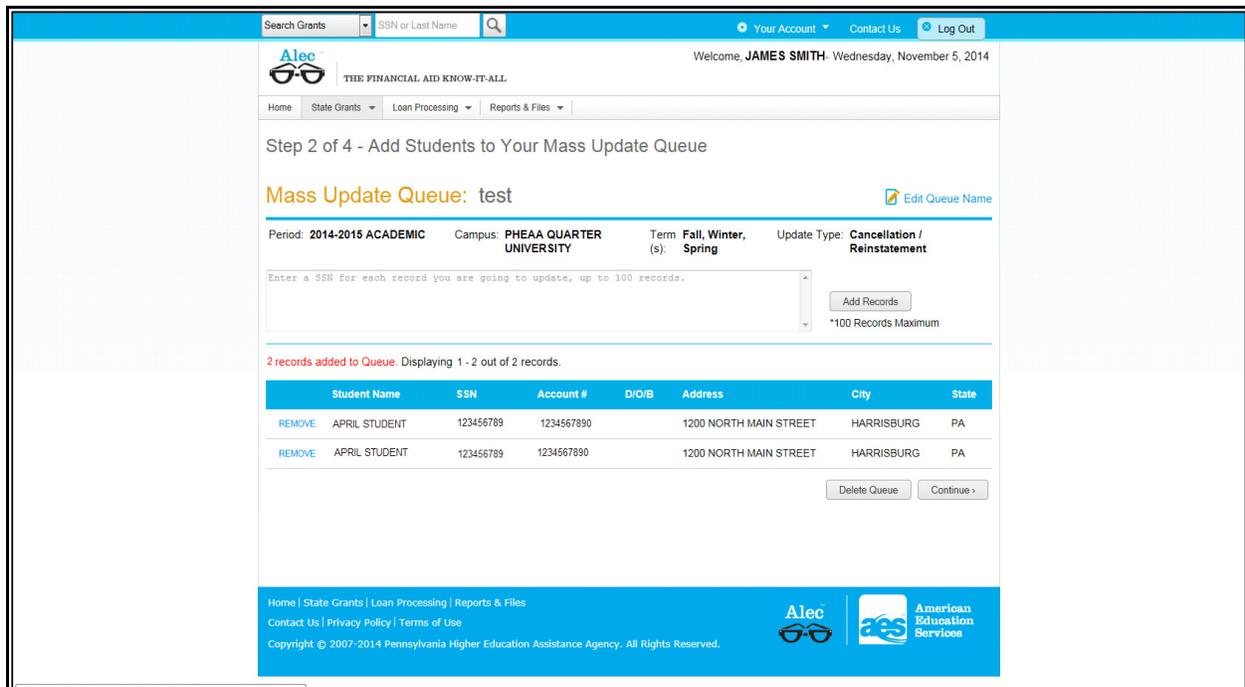


The **Mass Update Queue** field displays the name of the queue entered on the previous page. To change the name of the queue, click **Edit Queue Name**.

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

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

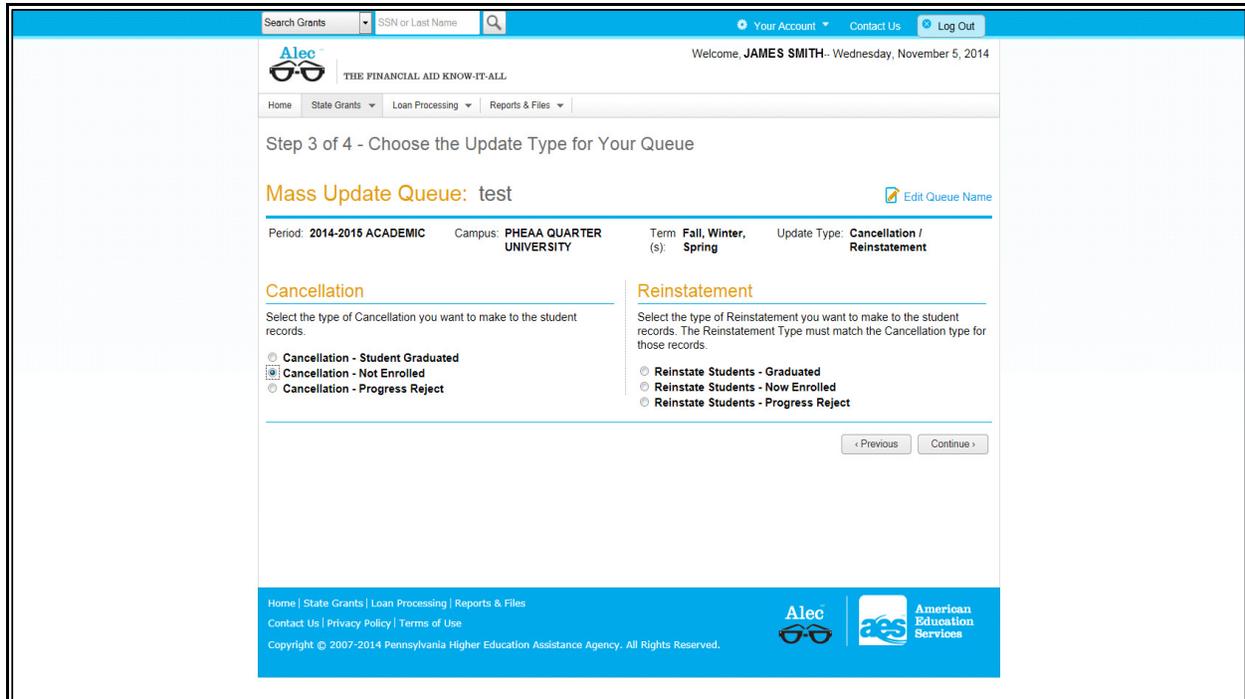
The **Step 2 of 4 – Add Students to Your Mass Updates Queue** page redisplay with the list of student records that have been added to the queue.



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

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

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



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

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

Cancellation

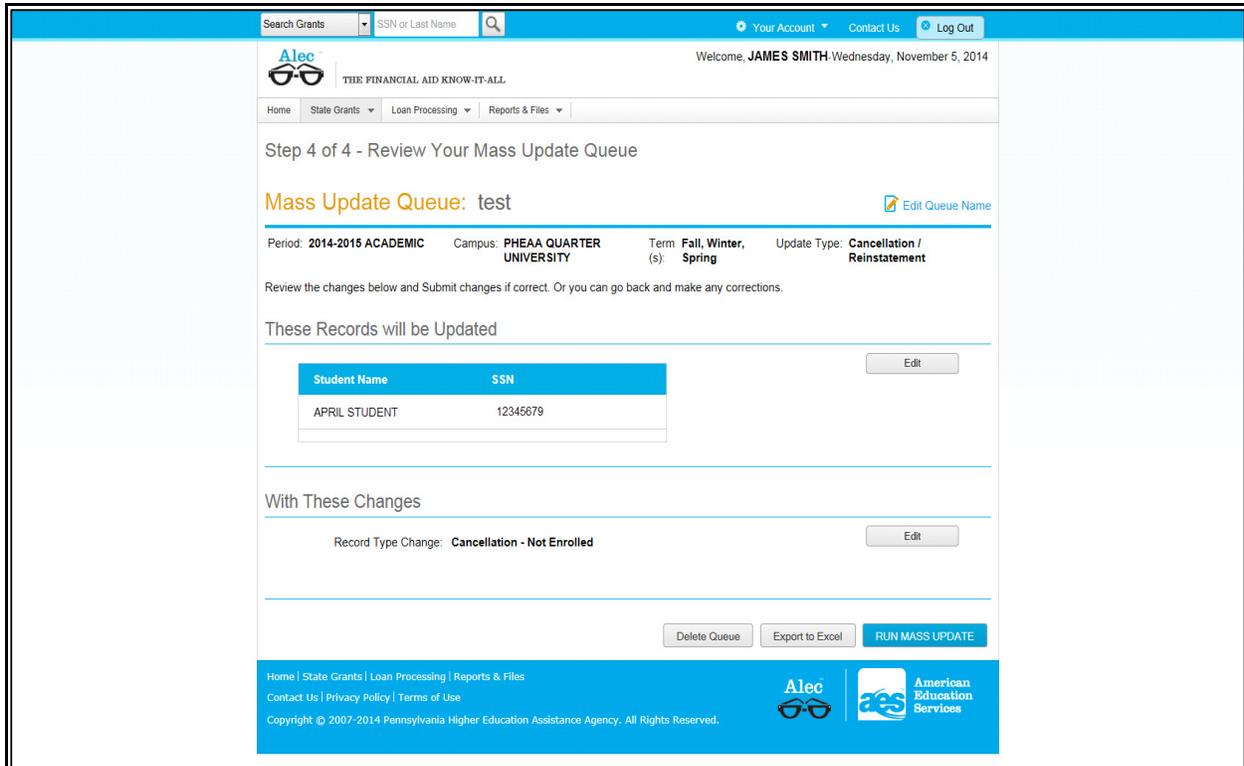
7. Select the type of cancellation to make to the student records.

Reinstatement

8. Select the type of reinstatement to make to the student records. The reinstatement type can only be used with a previous cancellation and must match the cancellation type.

9. Click the **Previous** button to return to step two, or click the **Continue** button.

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



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

Welcome, JAMES SMITH - Wednesday, November 5, 2014

Alec THE FINANCIAL AID KNOW-IT-ALL

Home | State Grants | Loan Processing | Reports & Files

Step 4 of 4 - Review Your Mass Update Queue

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

Period: 2014-2015 ACADEMIC | Campus: PHEAA QUARTER UNIVERSITY | Term (s): Fall, Winter, Spring | Update Type: Cancellation / Reinstatement

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

These Records will be Updated

Student Name	SSN	Edit
APRIL STUDENT	12345679	<input type="button" value="Edit"/>

With These Changes

Record Type Change: Cancellation - Not Enrolled

Home | State Grants | Loan Processing | Reports & Files
 Contact Us | Privacy Policy | Terms of Use
 Copyright © 2007-2014 Pennsylvania Higher Education Assistance Agency. All Rights Reserved.

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

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

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

10. 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.

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

12. To delete the queue, click the **Delete Queue** button.

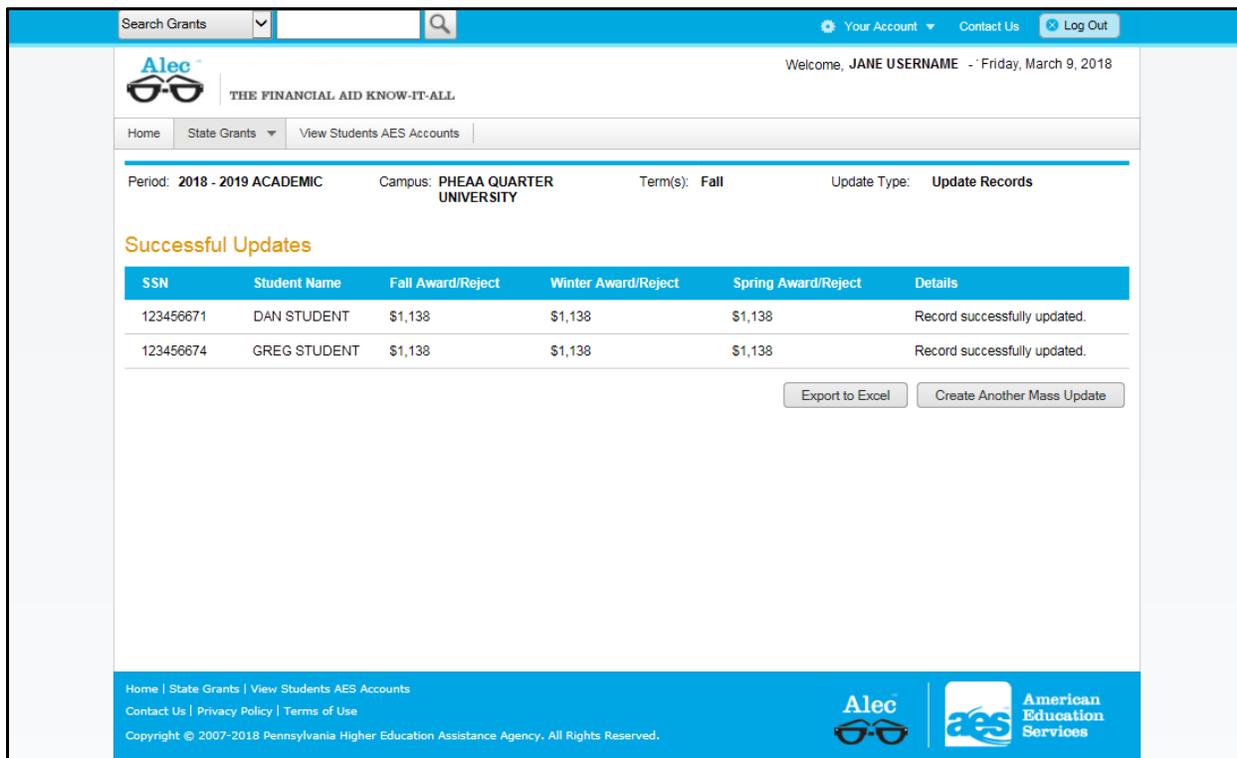
NOTE: A confirmation box, not shown, displays if the school user clicks **Delete Queue**. Click the **Yes, Delete Queue** button to delete the queue.

School Portal State Grant Partner Interface

13. Click the **Export to Excel** button to export the update criteria to an Excel spreadsheet. Refer to [Appendix B - Export Mass Update Reports to Excel](#) for more information.
14. Click the **Run Mass Update** button 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, he or she will not be able to return to view the results.



The screenshot shows the PHEAA School Portal interface. At the top, there is a search bar and navigation links for 'Your Account', 'Contact Us', and 'Log Out'. The user is logged in as 'JANE USERNAME' on Friday, March 9, 2018. The main content area displays the following information:

- Period: 2018 - 2019 ACADEMIC
- Campus: PHEAA QUARTER UNIVERSITY
- Term(s): Fall
- Update Type: Update Records

Below this information, a section titled 'Successful Updates' contains a table with the following data:

SSN	Student Name	Fall Award/Reject	Winter Award/Reject	Spring Award/Reject	Details
123456671	DAN STUDENT	\$1,138	\$1,138	\$1,138	Record successfully updated.
123456674	GREG STUDENT	\$1,138	\$1,138	\$1,138	Record successfully updated.

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

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

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, not shown, displays a list of accounts that have been updated successfully but the eligibility has not be recalculated and is pending a review by PHEAA.

The **Unsuccessful Updates** section, not shown, 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.

15. Click the **View Records Individually** button, not shown, to cycle through the records that have not been updated successfully.

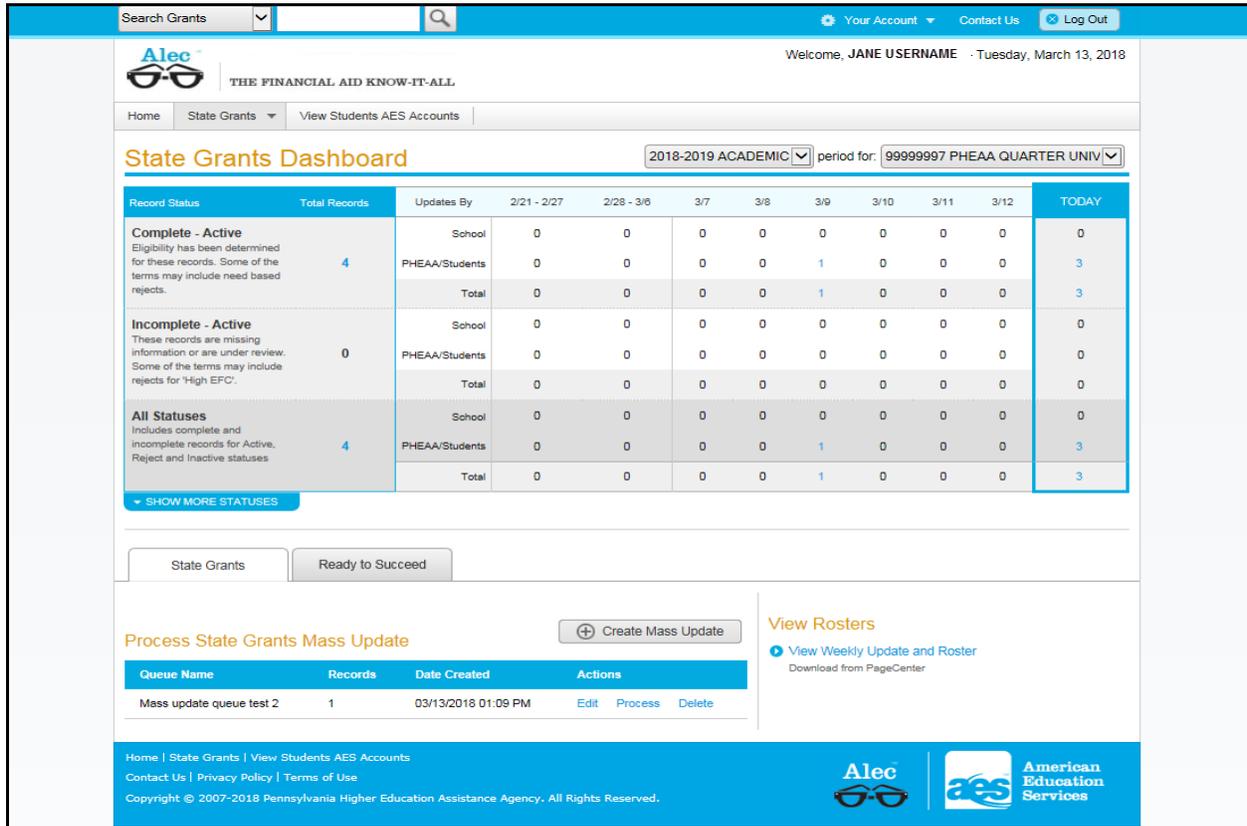
School Portal State Grant Partner Interface

16. Click the **Export to Excel** button to export the mass update report to an Excel spreadsheet.
See [Appendix B - Export Mass Update Reports to Excel](#) for more information.

17. Click the **Create Another Mass Update** button to create another mass update queue using the instructions in this section.

Edit Mass Update Queue

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



The screenshot displays the 'State Grants Dashboard' with a navigation bar at the top containing 'Search Grants', 'Your Account', 'Contact Us', and 'Log Out'. The main content area includes a 'State Grants Dashboard' header with filters for '2018-2019 ACADEMIC' and '99999997 PHEAA QUARTER UNIV'. Below this is a table showing record statuses and update counts by date.

Record Status	Total Records	Updates By	2/21 - 2/27	2/28 - 3/6	3/7	3/8	3/9	3/10	3/11	3/12	TODAY
Complete - Active Eligibility has been determined for these records. Some of the terms may include need based rejects.	4	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	1	0	0	0	3
		Total	0	0	0	0	1	0	0	0	3
Incomplete - Active These records are missing information or are under review. Some of the terms may include rejects for 'High EFC'.	0	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	0	0	0	0	0
		Total	0	0	0	0	0	0	0	0	0
All Statuses Includes complete and incomplete records for Active, Reject and Inactive statuses	4	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	1	0	0	0	3
		Total	0	0	0	0	1	0	0	0	3

Below the table, there are buttons for 'State Grants' and 'Ready to Succeed'. A 'Process State Grants Mass Update' section includes a 'Create Mass Update' button and a table of existing mass update queues.

Queue Name	Records	Date Created	Actions
Mass update queue test 2	1	03/13/2018 01:09 PM	Edit Process Delete

The footer contains navigation links, copyright information for PHEAA (2007-2018), and logos for Alec and American Education Services.

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

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

Search Grants [] [] Your Account [] Contact Us [] Log Out []

Welcome, JANE USERNAME - Friday, March 9, 2018

Alec™ THE FINANCIAL AID KNOW-IT-ALL

Home | State Grants [] | View Students AES Accounts []

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

Mass Update Queue: Mass Update Test 1 [Edit Queue Name](#)

Period: 2018-2019 ACADEMIC Campus: PHEAA QUARTER UNIVERSITY Term(s): Fall Update Type: Update Records

[] [] Add Records
*130 Records Maximum

3 records added to Queue. Displaying 1 - 3 out of 3 records.

	Student Name	SSN	Account #	D/O/B	Address	City	State
REMOVE	AMY STUDENT	123456670	1111111111		STUDENT IS INDEP-130 L	HARRISBURG	PA
REMOVE	DAN STUDENT	123456671	1111221111		DEP NEEDS 25D LTR 130 CODE J	HARRISBURG	PA
REMOVE	GREG STUDENT	123456674	1111144111		WEB FORM ELIG - PARA 2.D	HARRISBURG	PA

[Delete Queue](#) [Continue >](#)

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

Process Mass Update Queue

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

The screenshot shows the 'State Grants Dashboard' for the 2018-2019 Academic year. It features a table with record statuses and a 'Process State Grants Mass Update' section.

Record Status	Total Records	Updates By	2/21 - 2/27	2/28 - 3/6	3/7	3/8	3/9	3/10	3/11	3/12	TODAY
Complete - Active Eligibility has been determined for these records. Some of the terms may include need based rejects.	4	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	1	0	0	0	3
		Total	0	0	0	0	1	0	0	0	3
Incomplete - Active These records are missing information or are under review. Some of the terms may include rejects for "High EFC".	0	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	0	0	0	0	0
		Total	0	0	0	0	0	0	0	0	0
All Statuses Includes complete and incomplete records for Active, Reject and Inactive statuses	4	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	1	0	0	0	3
		Total	0	0	0	0	1	0	0	0	3

Queue Name	Records	Date Created	Actions
Mass update queue test 2	1	03/13/2018 01:09 PM	Edit Process Delete

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

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

Search Grants [] []

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Welcome, JANE USERNAME Tuesday, March 13, 2018

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Step 3 of 4 - Choose the Updates for Your Queue

Mass Update Queue: Mass update queue test 2 [Edit Queue Name](#)

Period: 2018 - 2019 ACADEMIC Campus: Pheaa Quarter University Term(s): Fall, Spring Update Type: Update Records

School Information

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

Program of Study: C - Bachelor's Degree (All Other Maj:)

Housing Status: 2 - Commuter

Enrollment Status: 3 - Half-time Student

Enrollment Mode: 1 - 100% classroom instruction

< Previous Continue >

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Alec American Education Services

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

Delete Mass Update Queue

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

The screenshot shows the State Grants Dashboard interface. At the top, there is a search bar and navigation links for 'Your Account', 'Contact Us', and 'Log Out'. The user is identified as 'JANE USERNAME' on 'Tuesday, March 13, 2018'. The dashboard title is 'State Grants Dashboard' with a dropdown for '2018-2019 ACADEMIC' and a 'period for' dropdown set to '99999997 PHEAA QUARTER UNIV'. Below this is a table showing record statuses and update counts by date.

Record Status	Total Records	Updates By	2/21 - 2/27	2/28 - 3/6	3/7	3/8	3/9	3/10	3/11	3/12	TODAY
Complete - Active Eligibility has been determined for these records. Some of the terms may include need based rejects.	4	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	1	0	0	0	3
		Total	0	0	0	0	1	0	0	0	3
Incomplete - Active These records are missing information or are under review. Some of the terms may include rejects for 'High EFC'.	0	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	0	0	0	0	0
		Total	0	0	0	0	0	0	0	0	0
All Statuses Includes complete and incomplete records for Active, Reject and Inactive statuses	4	School	0	0	0	0	0	0	0	0	0
		PHEAA/Students	0	0	0	0	1	0	0	0	3
		Total	0	0	0	0	1	0	0	0	3

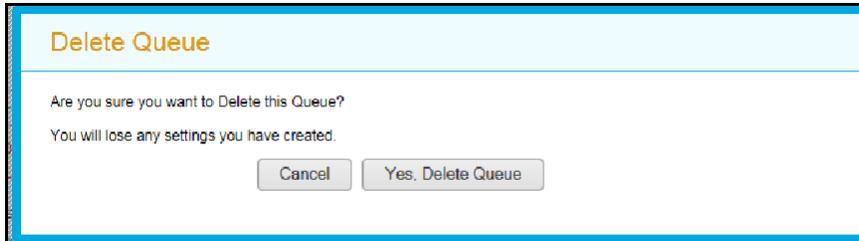
Below the table, there is a 'Process State Grants Mass Update' section with a 'Create Mass Update' button. A table lists a mass update queue:

Queue Name	Records	Date Created	Actions
Mass update queue test 2	1	03/13/2018 01:09 PM	Edit Process Delete

The 'Delete' button is highlighted in the screenshot. The footer contains navigation links, logos for Alec and American Education Services, and copyright information for the Pennsylvania Higher Education Assistance Agency.

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

The **Delete Queue** dialog box displays.



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

Request Primary School Change

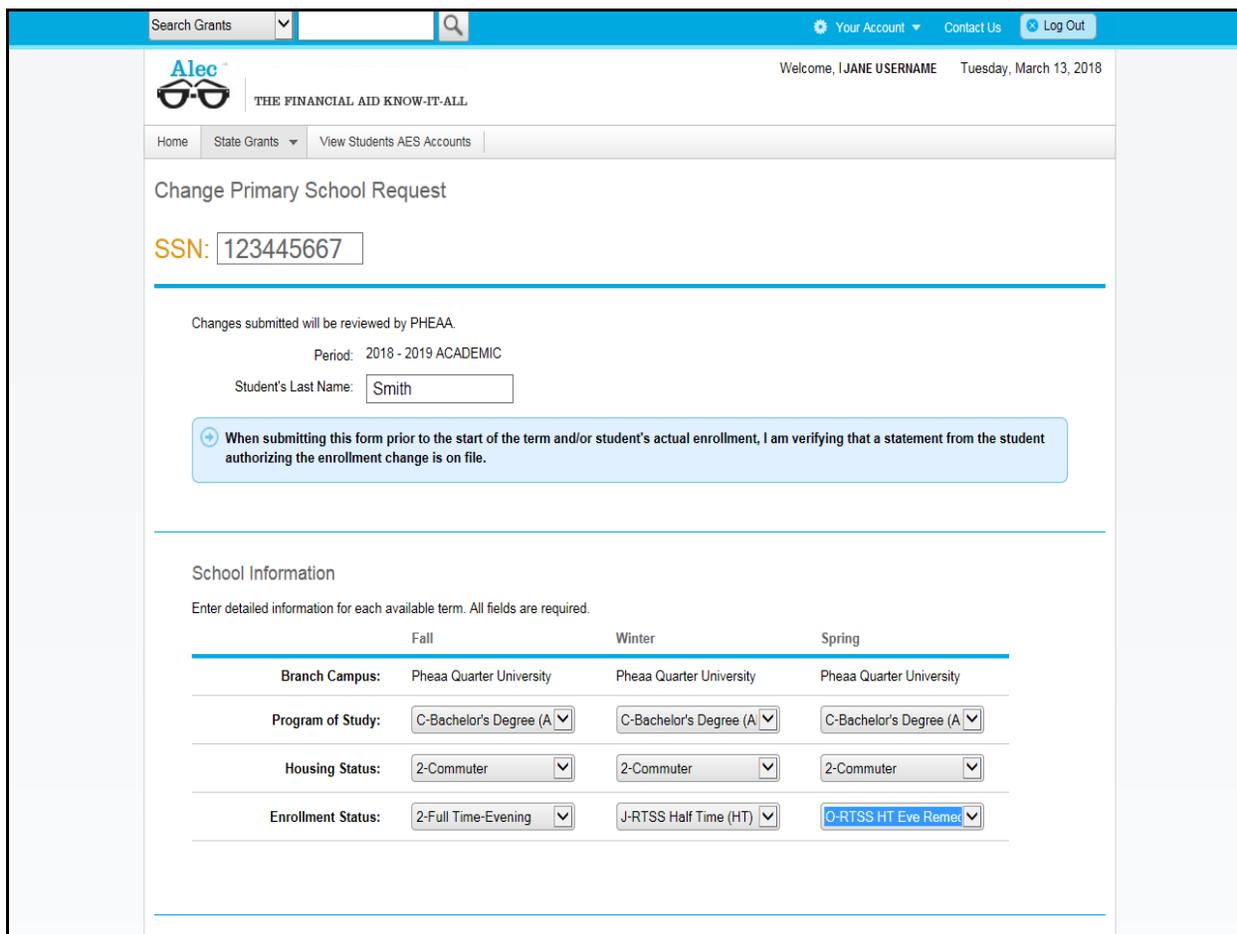
School users can submit a request to update the student's Primary School for the current academic year. Beginning with the 2016-17 academic year, secondary (alternate choice 2 through 10) do not display in the State Grant system. All requests must be made from the **Home** page or from the **State Grants** drop-down list.

The screenshot displays the PHEAA School Portal State Grant Partner Interface. At the top, there is a search bar for grants and a user account section with 'Your Account', 'Contact Us', and 'Logout' options. The main content area is divided into several sections: 'State Grants' (with links for dashboard, mass update queue, education costs, and primary school change), 'Loan Processing' (with a link for AES accounts), 'Messages' (no messages), 'Alerts (Notifications)' (no alerts), 'Order Materials' (program materials), 'Training & Publications' (training event schedule, document library, loan notes, common manual), and 'Default Prevention' (you can deal with it, YCDWI downloads, education planner). The footer includes the PHEAA logo, copyright information for 2007-2018, and logos for Alec and American Education Services.

1. Click **Request Primary School Change** on the **Home** page or select it from the **State Grants** drop-down list.

School Portal State Grant Partner Interface

The **Change Primary School Request** screen redisplayes when the primary school user makes a request from the State Grant Home page or drop-down list and when the secondary school user makes a request from the Student Record.



Search Grants

Your Account

Welcome, IJANE USERNAME Tuesday, March 13, 2018

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Change Primary School Request

SSN:

Changes submitted will be reviewed by PHEAA.
 Period: 2018 - 2019 ACADEMIC
 Student's Last Name:

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

School Information

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

	Fall	Winter	Spring
Branch Campus:	Pheaa Quarter University	Pheaa Quarter University	Pheaa Quarter University
Program of Study:	<input type="text" value="C-Bachelor's Degree (A)"/>	<input type="text" value="C-Bachelor's Degree (A)"/>	<input type="text" value="C-Bachelor's Degree (A)"/>
Housing Status:	<input type="text" value="2-Commuter"/>	<input type="text" value="2-Commuter"/>	<input type="text" value="2-Commuter"/>
Enrollment Status:	<input type="text" value="2-Full Time-Evening"/>	<input type="text" value="J-RTSS Half Time (HT)"/>	<input type="text" value="O-RTSS HT Eve Remed"/>

- In the **SSN** field, enter the student's nine-digital Social Security number.
- In the **Student's Last Name** field, enter the student's last name.

NOTE: The **SSN** and **Student's Last Name** fields may be system-populated when a secondary school user accesses the **Change Primary School Request** screen through the Student Record.

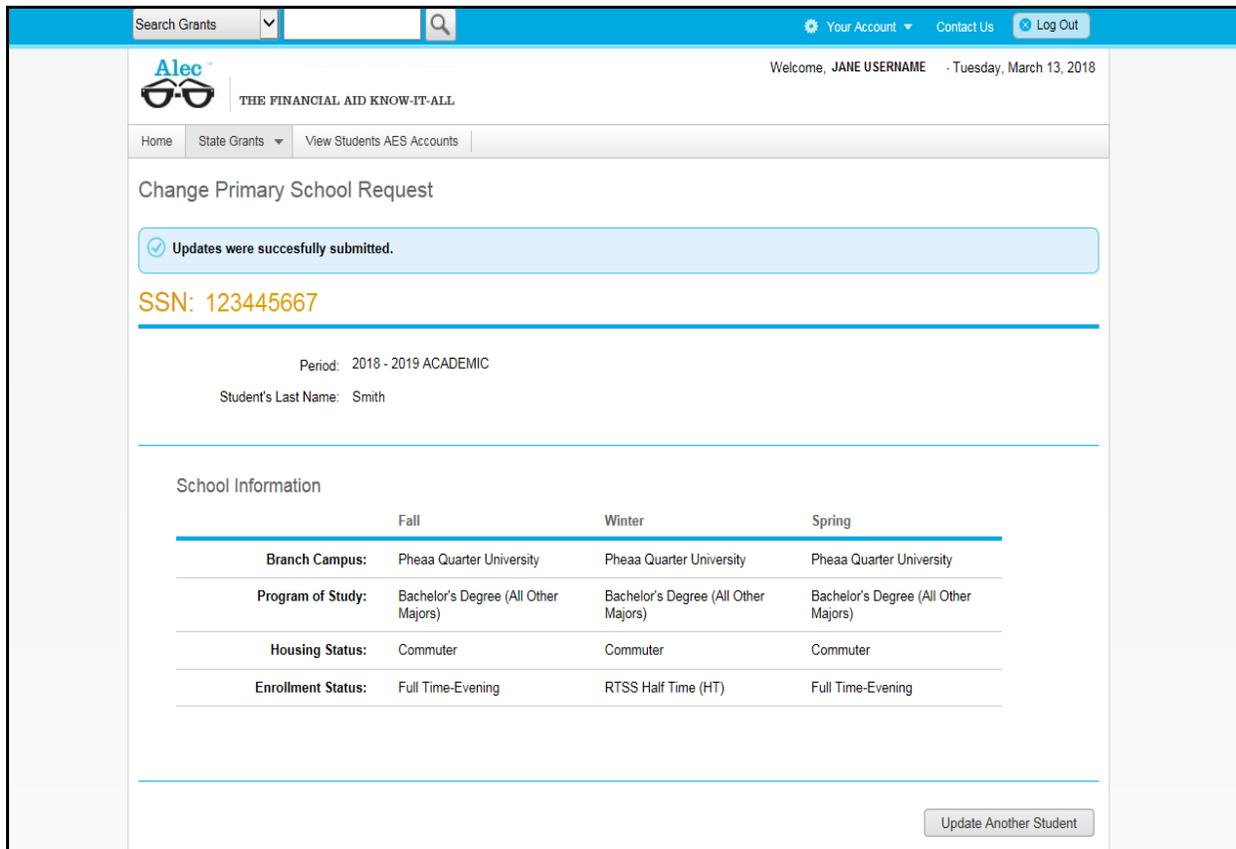
In the **School Information** section, select the appropriate information for each term.

NOTE: PHEAA disables the fall term annually around September 30th. The winter term displays for all schools—even those on a semester schedule—but data is not required.

School Portal State Grant Partner Interface

4. Click the down arrow in the **Branch Campus** field and select a branch campus from the drop-down list, if applicable. If not applicable, this field displays the name of the school and cannot be changed.
5. Click the down arrow in the **Program of Study** field and select a program of study from the drop-down list. This field is dynamic and displays choices based on the school and/or branch campus that was selected in the **Branch Campus** field.
6. Click the down arrow in the **Housing Status** field and select a housing status from the drop-down list.
7. Click the down arrow in the **Enrollment Status** field and select the student's enrollment status from the drop-down list. This includes enrollment status for the RTSS program.
8. Click **Submit** to submit the request, or click **Cancel** to return to the **State Grant Dashboard** without submitting the changes.

The **Change Primary School Request** redisplay with a message the school change was successful.



The screenshot shows the 'Change Primary School Request' page. At the top, there is a search bar and navigation links for 'Your Account', 'Contact Us', and 'Log Out'. The user is logged in as 'JANE USERNAME' on Tuesday, March 13, 2018. The page title is 'Change Primary School Request'. A blue message box states 'Updates were successfully submitted.' Below this, the SSN is displayed as '123445667'. The academic period is '2018 - 2019 ACADEMIC' and the student's last name is 'Smith'. A table titled 'School Information' shows details for Fall, Winter, and Spring semesters. At the bottom right, there is an 'Update Another Student' button.

	Fall	Winter	Spring
Branch Campus:	Pheaa Quarter University	Pheaa Quarter University	Pheaa Quarter University
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)
Housing Status:	Commuter	Commuter	Commuter
Enrollment Status:	Full Time-Evening	RTSS Half Time (HT)	Full Time-Evening

9. Click **Update Another Student** to request another school update.

IMPORTANT! Requests are processed manually by date in the order in which they are received. Secondary school users can view the open request on the **Activity Log** on the Student Record. See [Activity Log](#) for more information.

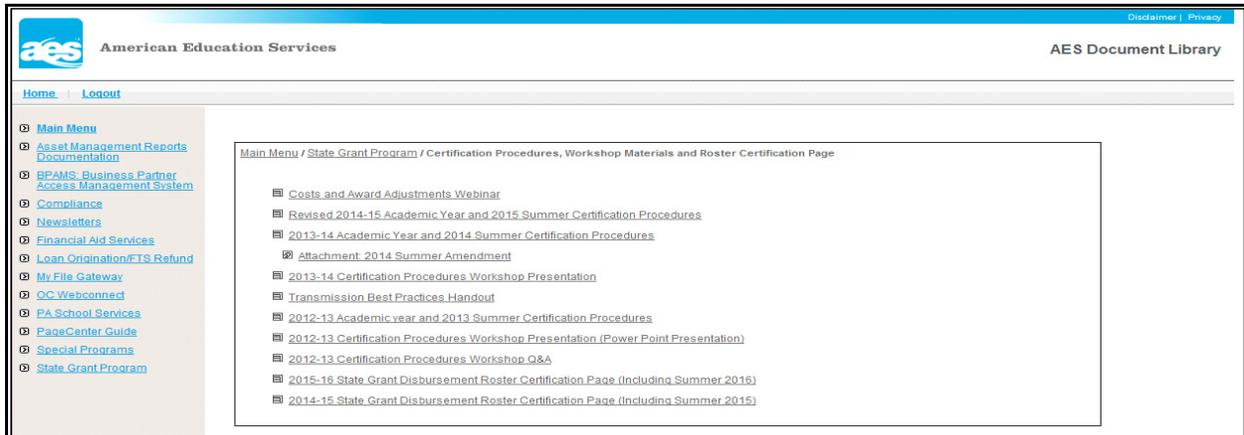
Access Disbursement Certification

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

The screenshot shows the Alec School Portal interface. At the top, there is a search bar for grants and a user account section. The main navigation includes Home, State Grants, Loan Processing, and Reports & Files. The State Grants section contains links for viewing dashboards, creating update queues, education costs, and requesting school changes. The Loan Processing section includes links for AES accounts and system access. The Reports & Files section offers standard reports and file exchange. The right sidebar provides messages, alerts, program materials, training, and default prevention resources. The footer contains the Alec logo, American Education Services logo, and copyright information for the Pennsylvania Higher Education Assistance Agency.

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

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



The screenshot shows the AES Document Library interface. At the top left is the AES logo and "American Education Services". At the top right is "Disclaimers | Privacy" and "AES Document Library". Below the header is a navigation bar with "Home" and "Logout". A left sidebar contains a menu with items like "Main Menu", "Asset Management Reports Documentation", "BPAMS: Business Partner Access Management System", "Compliance", "Newsletters", "Financial Aid Services", "Loan Origination/FTS Refund", "My File Gateway", "OC Webconnect", "PA School Services", "PageCenter Guide", "Special Programs", and "State Grant Program". The main content area displays a breadcrumb trail: "Main Menu / State Grant Program / Certification Procedures, Workshop Materials and Roster Certification Page". Below the breadcrumb is a list of document links, including "Costs and Award Adjustments Webinar", "Revised 2014-15 Academic Year and 2015 Summer Certification Procedures", "2013-14 Academic Year and 2014 Summer Certification Procedures", "Attachment: 2014 Summer Amendment", "2013-14 Certification Procedures Workshop Presentation", "Transmission Best Practices Handout", "2012-13 Academic year and 2013 Summer Certification Procedures", "2012-13 Certification Procedures Workshop Presentation (Power Point Presentation)", "2012-13 Certification Procedures Workshop Q&A", "2015-16 State Grant Disbursement Roster Certification Page (Including Summer 2016)", and "2014-15 State Grant Disbursement Roster Certification Page (Including Summer 2015)".

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

School Portal State Grant Partner Interface

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

DISBURSEMENT CERTIFICATION

WARNING: Any person who knowingly makes a false statement or misrepresentation on this form is subject to penalties which may include fines or imprisonment under the United States Criminal Code and 20 U.S.C. 1097.

1. OE Code:

2. School Information:

Name:

Address:

Phone Number:

To be completed by a financial aid administrator or other school official authorized to certify financial aid forms.

3. Certification Period:

4. Date of Roster:

CERTIFICATION STATEMENT

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

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

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

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

5. Name/Title 6. Date

7. E-Mail Address of School Official

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.

School Portal State Grant Partner Interface

5. Click the down arrow in the **Certification Period** field and select a certification period from the drop-down list.
6. Click the down arrows in the **Date of Roster** field and select the month, day and year of the disbursement roster.
7. In the **Name/Title** field, enter the name and title of the financial aid administrator or other school official who completed the **Disbursement Certification** form.
8. Click the down arrows in the **Date** field and select the month, day and year the **Disbursement Certification** form was completed.
9. In the **E-Mail Address of School Official** field, enter the email address of the financial aid administrator or other school official who completed the **Disbursement Certification** form.
10. Click **Submit** to submit the form, or click **Reset** to reset the form and start again.

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

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

Appendix A - Eligibility Summary Data on FG0B and the Partner Interface

PHEAA offers school users the ability to view a student’s history using the Grant Eligibility Search transaction (FG0B) or the Eligibility Summary page on the Partner Interface—the FG0B equivalent on the Web. The ability to view this information is necessary for certifying that a student meets the satisfactory academic progress requirements for the Pennsylvania State Grant Program; however, for compliance and security purposes, PHEAA must limit the data a school user can view. In order to view the current and prior year information for a student, schools must be the primary choice in a State Grant record for which eligibility has been determined* for the academic year. The table below provides examples.

Available Data on FG0B/Eligibility Summary	Conditions
<ul style="list-style-type: none"> Current academic year All prior academic years 	<ul style="list-style-type: none"> Your school is a primary choice in the State Grant record for at least one term of the current year; AND The State Grant record is in either an award or reject status
<ul style="list-style-type: none"> No available data 	<ul style="list-style-type: none"> Your school is a primary choice in the State Grant record for at least one term of the current year; AND The current record is incomplete but not rejected; AND Your school was never a primary choice in a prior award year; OR Your school has never been a primary choice on a completed or incomplete State Grant record.
<ul style="list-style-type: none"> All prior academic years 	<ul style="list-style-type: none"> Your school was a primary choice in a prior award year but not in the current award year.
<ul style="list-style-type: none"> Upcoming academic year Current summer term All prior year data 	<ul style="list-style-type: none"> Your school is the primary choice for summer term; AND The summer term record is in either an award or reject status.

The summer term is treated as a “header” for purpose of the Eligibility Summary. When applicable, the Eligibility Summary in the Partner Interface displays history prior to the 2007-08 academic year just like FG0B.

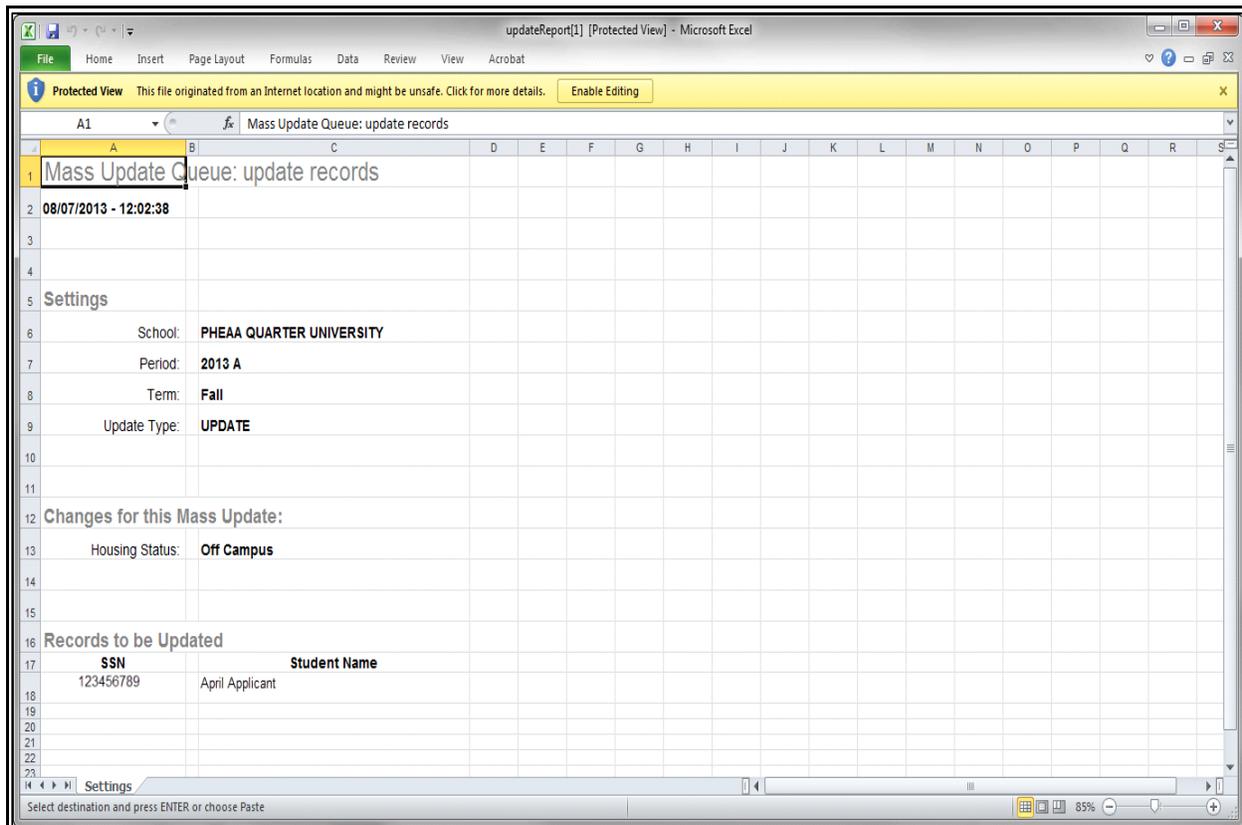
*Most records where eligibility has been determined have a status of **Complete/Active** or **Complete/Reject**; however, **Incomplete/Rejects** are considered to have had an eligibility determination for purposes of this display.

Appendix B - Export Mass Update Reports to Excel

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

Before Mass Update

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

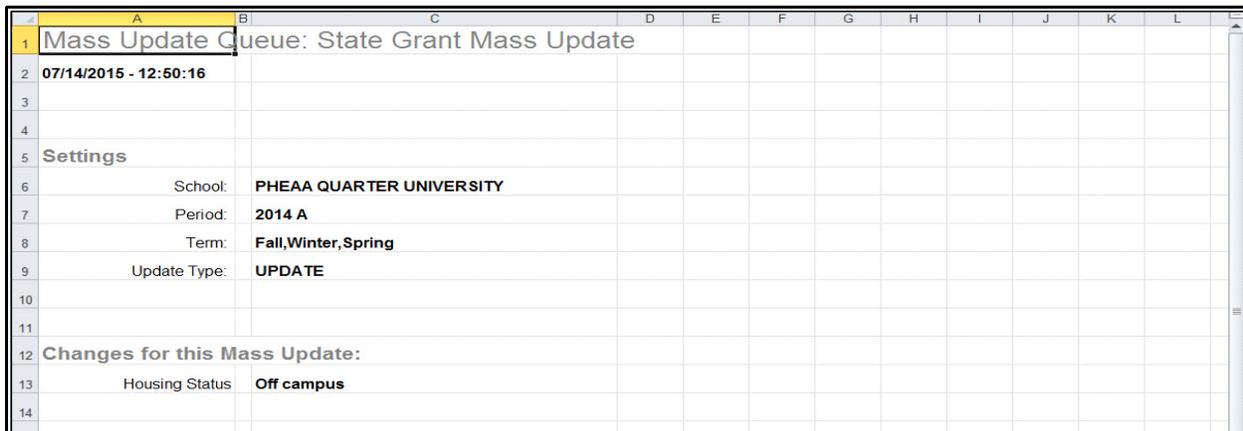


The screenshot shows a Microsoft Excel spreadsheet titled "updateReport[1] [Protected View] - Microsoft Excel". The spreadsheet content is as follows:

Row	Column A	Column B	Column C
1	Mass Update Queue: update records		
2	08/07/2013 - 12:02:38		
3			
4			
5	Settings		
6	School:	PHEAA QUARTER UNIVERSITY	
7	Period:	2013 A	
8	Term:	Fall	
9	Update Type:	UPDATE	
10			
11			
12	Changes for this Mass Update:		
13	Housing Status:	Off Campus	
14			
15			
16	Records to be Updated		
17	SSN	Student Name	
18	123456789	April Applicant	
19			
20			
21			
22			
23			

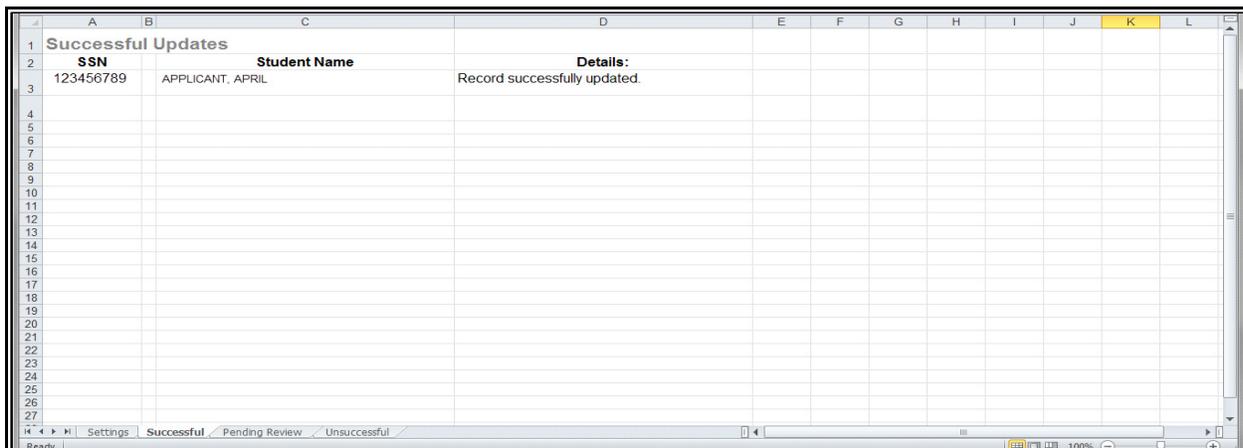
After Mass Update

If the export is done after the mass update is run, both the criteria and the results of the update are exported to a four-page Excel spreadsheet. The first page 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 tabs display a list of the students by the following update statuses: Successful, Pending Review, and Unsuccessful.



	A	B	C	D	E	F	G	H	I	J	K	L
1	Mass Update Queue: State Grant Mass Update											
2	07/14/2015 - 12:50:16											
3												
4												
5	Settings											
6		School:	PHEAA QUARTER UNIVERSITY									
7		Period:	2014 A									
8		Term:	Fall,Winter,Spring									
9		Update Type:	UPDATE									
10												
11												
12	Changes for this Mass Update:											
13		Housing Status	Off campus									
14												

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



	A	B	C	D	E	F	G	H	I	J	K	L
1	Successful Updates											
2	SSN	Student Name	Details:									
3	123456789	APPLICANT, APRIL	Record successfully updated.									
4												
5												
6												
7												
8												
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Appendix C: Prior Years Information

This section of the document describes screens that display different fields for prior years.

Award Information – Secondary School (2-10 College Choice)

For academic years prior to 2016-17, the **Award Information** tab displays a section labeled **Estimated Eligibility for Your Institution** between the **Student Information** and **Grant Information** sections when the user is not listed as a primary school in the State Grant record. Beginning with the 2016-17 academic year, the **Award Information** tab does not display for secondary school users. See [Appendix A - Eligibility Summary Data on FG0B and the Partner Interface](#) for more information.

Institutions are NOT Permitted to Use this Data to Credit an Award displays in red to the right of **Estimated Eligibility for Your Institution**.

Award Information		Activity Log		Application Info	
Student Information					
Address:	1200 North Main Street Harrisburg, PA 17102	Phone:	(717) 720-5555	Email:	studentemailaddress@pheaa.org
				H.S. Graduation:	2014
Estimated Eligibility for Your Institution		Institutions are NOT Permitted to Use this Data to Credit an Award			
	Fall	Winter	Spring	Academic Year Total	
Alternate School:	99999997.01 Pheaa Quarter University		99999997.01 Pheaa Quarter University		
Full Time Award:	\$1,223		\$1,223	\$4,892	
Part Time Award:	\$611		\$611	\$2,444	
Housing Status	Commuter		Commuter		
<p>ⓘ If the student will be enrolled at your institution for the current Academic Period, you can submit a request to change the student's school to your school.</p> <p>Change Student's School</p>					
Grant Information					
	Fall	Winter	Spring	Academic Year Total	
School Name (OE Code):	99999999.01 Pheaa University Of Harrisburg		99999999.01 Pheaa University Of Harrisburg		
Program of Study:	Bachelor's Degree (All Other Majors)		Bachelor's Degree (All Other Majors)		
Award Date:	11/05/2014		11/05/2014		
Housing Status:	Commuter		Commuter		
Enrollment Status:	Full Time Student		Full Time Student		
Award/Reject:					
Alternate Award (AA)	N/A		N/A		
Enrollment Status for AA:	Part-Time		Part-Time		
Remedial Exception:					0.0
Award Counters:	0.5		0.5		1
Award Type:	Processed		Processed		
Cancellation Reason:	Student Not Enrolled		Student Not Enrolled		
School Adjustment Reason:					
PHEAA Adjustment Reason:					

School Portal State Grant Partner Interface

The **Estimated Eligibility for Your Institution** section displays information about the student's estimated eligibility for the secondary school.

The **Alternate School** field displays the alternate school's 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. *This field displays only for academic years prior to 2016-17.*

The **Full Time Award** field displays the potential eligibility if the student was enrolled at the secondary school full-time.

The **Part Time Award** field displays the potential eligibility if the student was enrolled at the secondary school part-time.

The **Housing** field displays the housing choice that was provided on the FAFSA for the secondary school.

NOTE: Estimated eligibility for **Secondary** school choices cannot be calculated when the choice is a Business, Trade and Technical school or a Nursing school because the student's program of study and academic level are not collected on the FAFSA but are essential to calculating eligibility for these school types.

NOTE: To print the **Student Record** and the **Award Information** tab on one page, click **File** then **Print Preview** on the Web browser. Reduce the print size to 60% then select **Print**.

1. To change the student's primary school to the alternate school, click the **Change Student's School** link. See [Request Primary School Change](#) for step-by-step instructions.

Grant Information for Years Prior to 2018-19

For academic years which included the Distance Education Pilot Program prior to 2018-19, the **Grant Information** section of the **Award Information** tab displays credit fields.

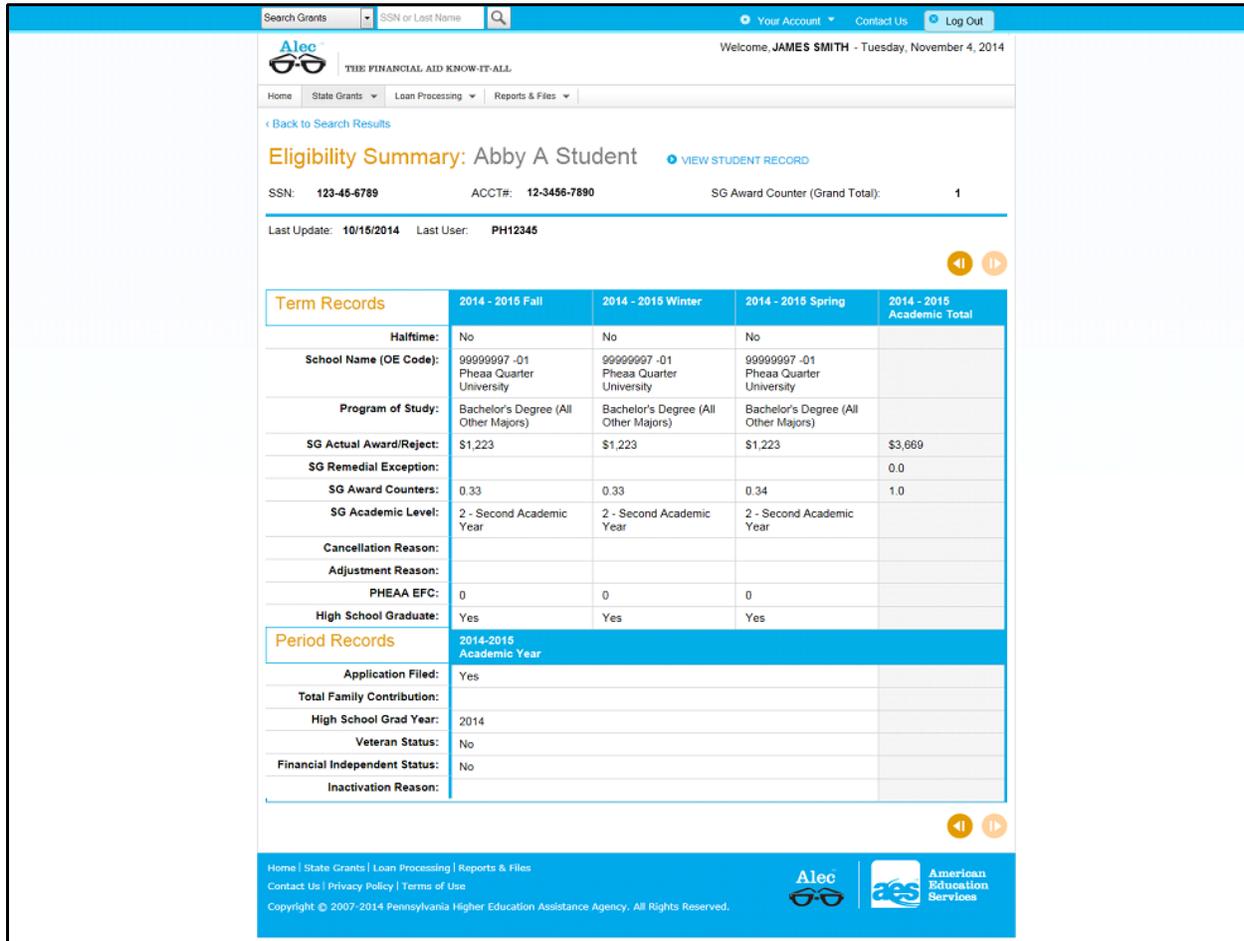
Award Information School Notes Activity Log Application Info				
Student Information				
Address:	1200 North Main Street Harrisburg, PA 17102	Phone:	(717) 720-5555	Email: studentemailaddress@pheaa.org
H.S. Graduation:	2014			
Grant Information				
	Fall	Winter	Spring	Academic Year Total
School Name (OE Code):	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	99999997-01 Pheaa Quarter University	
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	
Award Date:	10/15/2014	10/15/2014	10/15/2014	
Housing Status:	Dormitory	Dormitory	Dormitory	
Enrollment Status:	Full Time Student	Full Time Student	Full Time Student	
Award/Reject:	\$1,223	\$1,223	\$1,223	\$3,669
Alternate Award (AA)	\$611	\$611	\$611	\$5,499
Enrollment Status for AA:	Part-Time	Part-Time	Part-Time	
Remedial Exception:				0.0
Award Counters:	0.34	0.34	0.34	1
Award Type:	Processed	Processed	Processed	
Cancellation Reason:				
School Adjustment Reason:				
PHEAA Adjustment Reason:				
Classroom Credits:				
Online Credits:				
Academic Level:	2 - Second Academic Year	2 - Second Academic Year	2 - Second Academic Year	
Total College Cost:	\$20,500	\$20,500	\$20,500	
PHEAA Estimated Pell:	5730	5730	5730	
PHEAA EFC	0	0	0	

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

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

Eligibility Summary for Years 2014 and Prior

The **Eligibility Summary** screen for academic year 2014-2015 and prior years displays different fields.



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Back to Search Results

Eligibility Summary: Abby A Student | VIEW STUDENT RECORD

SSN: 123-45-6789 | ACCT#: 12-3456-7890 | SG Award Counter (Grand Total): 1

Last Update: 10/15/2014 | Last User: PH12345

Term Records	2014 - 2015 Fall	2014 - 2015 Winter	2014 - 2015 Spring	2014 - 2015 Academic Total
Halftime:	No	No	No	
School Name (OE Code):	99999997 -01 Pheaa Quarter University	99999997 -01 Pheaa Quarter University	99999997 -01 Pheaa Quarter University	
Program of Study:	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	Bachelor's Degree (All Other Majors)	
SG Actual Award/Reject:	\$1,223	\$1,223	\$1,223	\$3,669
SG Remedial Exception:				0.0
SG Award Counters:	0.33	0.33	0.34	1.0
SG Academic Level:	2 - Second Academic Year	2 - Second Academic Year	2 - Second Academic Year	
Cancellation Reason:				
Adjustment Reason:				
PHEAA EFC:	0	0	0	
High School Graduate:	Yes	Yes	Yes	

Period Records	2014-2015 Academic Year
Application Filed:	Yes
Total Family Contribution:	
High School Grad Year:	2014
Veteran Status:	No
Financial Independent Status:	No
Inactivation Reason:	

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Alec | American Education Services

The following fields display:

- Halftime
- School Name (OE Code)
- Program of Study
- SG Actual Award/Reject
- SG Remedial Exception
- SG Award Counters
- SG Academic Level
- Cancellation Reason
- Adjustment Reason
- PHEAA EFC (expected family contribution)

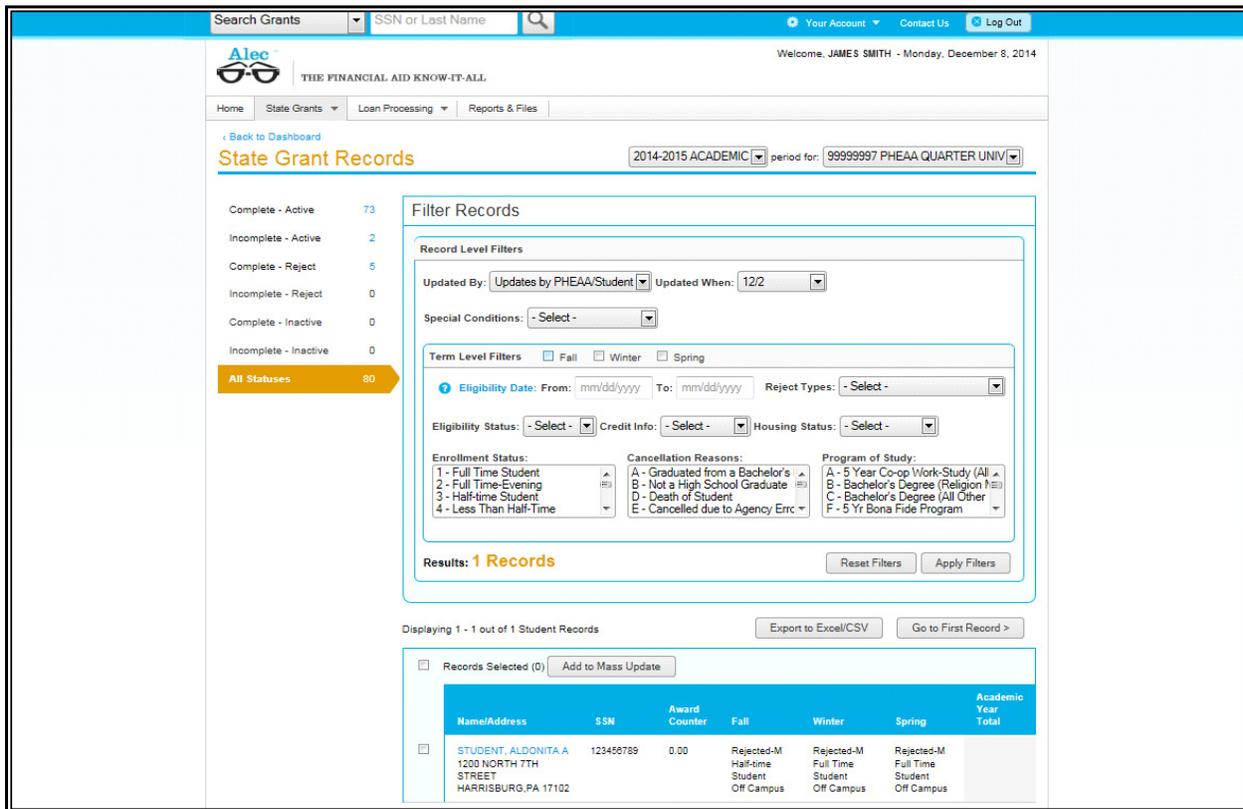


School Portal State Grant Partner Interface

- High School Graduate
- Application Filed
- Total Family Contribution
- High School Grad Year
- Veteran Status
- Financial Independent Status
- Inactivation Reason

View the State Grant Records Student List for Years Prior to 2018-19

The **State Grant Records Student List** displays when a school user selects **View Records List** in the **Record Status List** on the **State Grants Dashboard**. It displays in two panes: an abbreviated summary of the **State Grants Dashboard**, left; and a list of student records in the selected status, right. Options are available in the **Filter Records** section to filter and sort the records in the **Student List**. This section describes the fields that display for years prior to 2018-19.



The screenshot displays the PHEAA State Grant Records Student List interface. On the left, a summary pane shows record counts for various statuses: Complete - Active (73), Incomplete - Active (2), Complete - Reject (5), Incomplete - Reject (0), Complete - Inactive (0), and Incomplete - Inactive (0). The 'All Statuses' button is highlighted with a count of 80. The main area features a 'Filter Records' section with the following options:

- Record Level Filters:** Updated By: Updates by PHEAA/Student, Updated When: 12/2
- Special Conditions:** - Select -
- Term Level Filters:** Checkboxes for Fall, Winter, and Spring.
- Eligibility Date:** From: mm/dd/yyyy, To: mm/dd/yyyy, Reject Types: - Select -
- Eligibility Status:** - Select -
- Credit Info:** - Select -
- Housing Status:** - Select -
- Enrollment Status:** 1 - Full Time Student, 2 - Full Time-Evening, 3 - Half-time Student, 4 - Less Than Half-Time
- Cancellation Reasons:** A - Graduated from a Bachelor's, B - Not a High School Graduate, D - Death of Student, E - Cancelled due to Agency Errc
- Program of Study:** A - 5 Year Co-op Work-Study (All), B - Bachelor's Degree (Religion), C - Bachelor's Degree (All Other), F - 5 Yr Bonus Fide Program

Results: 1 Records. Below the filters, there is a table displaying 1 student record:

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
STUDENT, ALDONITA A 1200 NORTH 7TH STREET HARRISBURG, PA 17102	123456789	0.00	Rejected-M Half-time Student Off Campus	Rejected-M Full Time Student Off Campus	Rejected-M Full Time Student Off Campus	

1. To view a summary and a list of student records for the same time period in a different academic year or summer period, click the down arrow in the academic year field to select the academic year to display.
2. To view a summary and a list of student records for the same academic year or summer period but for a different branch, click the down arrow in the school field to select the branch.
3. To view a summary and a list of student records with a different status, click the status in the summary pane on the left side of the dashboard.

NOTE: Only statuses with at least one updated record may be selected.

School Portal State Grant Partner Interface

Record-level and term-level filters are available to filter the list of student records further.

NOTE: When selected, filters are applied only to the records in the selected status. Select the status from the status list before applying filters.

The record-level filters filter the list of student records by record information.

4. Click the down arrow in the **Updated By** field and select one of the following to indicate who updated the record.
 - **School** – indicates that the record was last updated by a school user
 - **PHEAA/Student** – indicates that the record was last updated by a PHEAA user or program, or that information was received electronically from a student
 - **School/PHEAA/Student** – total of all updates for the school, PHEAA and the student
5. Click the down arrow in the **Updated When** field and select a date from the drop-down list to indicate when the updates were made. This list includes the previous three weeks beginning with the current date.
6. Check one or more status in the **Record Status** field. *This field displays when All Statuses is selected.*
7. Click the down arrow in the **Special Conditions** field and select one of the following special conditions from the drop-down list. *This field displays when ALL STATUSES, Complete-Active or Complete-Reject are selected.*
 - **Collectibles** – Records for which PHEAA is collecting a State Grant award directly from the student. These records are sorted at the beginning of disbursement rosters. A special message displays on the Student Record when a collectible exists.
 - **Validation Processing** – Records that have been completed or canceled for PHEAA's Income Validation.
 - **Late Processing** – Records where the student filed past the deadline but PHEAA extended the deadline for all students and reprocessed the student as on-time. For example, in 2012-13, PHEAA extended the May 1, 2012 deadline to June 12, 2012 and the August 1, 2012 deadline to September 12, 2012.

The term-level filters filter the list of student records by term information.

8. In the **Term Level Filters** field, select a one or more terms. Select **Fall**, **Winter** and/or **Spring**.

NOTE: If no terms are selected, the filter will provide results for all terms.

School Portal State Grant Partner Interface

9. In the **Eligibility Date** field, enter a date range in the **From** and **To** fields to view records for a specific date range where eligibility was determined or an award was canceled or adjusted. Enter the dates in MM/DD/YYYY format.

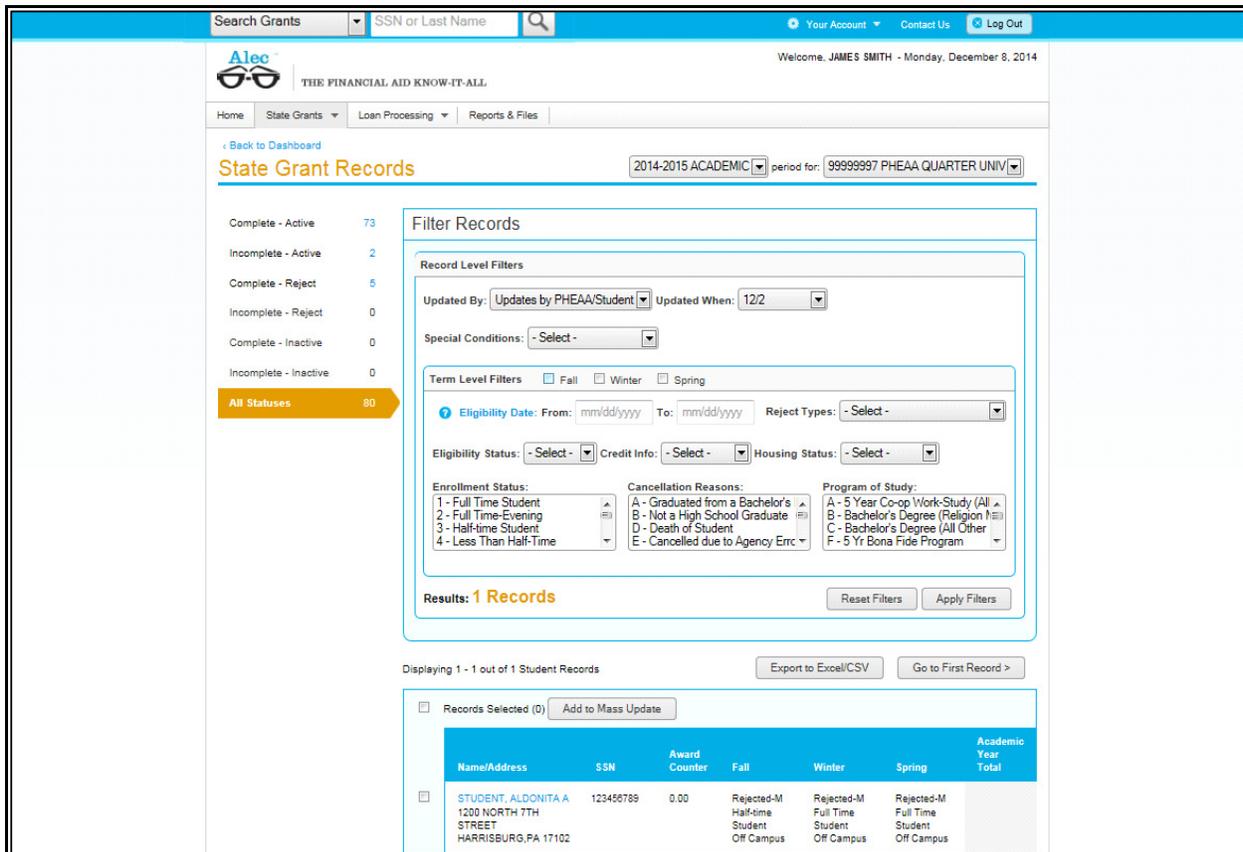
NOTE: A Help icon displays to the left of the **Eligibility Date** field. Click the icon to display additional information about the eligibility date.

10. Click the down arrow in the **Reject Types** field and select a reject, or ineligibility, reason from the drop-down list.
11. Click the down arrow in the **Eligibility Status** field and select one of the following eligibility statuses from the drop-down list.
 - **Awarded** – Records that have an award greater than zero in the term or terms being filtered
 - **Reject** – Records that have an ineligibility reason in the term or terms being filtered
 - **Cancelled** – Records that have been canceled and have an award of zero in the term or terms being filtered. Results will show any cancellation reason
 - **Pending** – Records that are pending eligibility determination in the term or terms being filtered
12. Click the down arrow in the **Credit Info** field and select **Reported** or **Not Reported** from the drop-down list.
13. Click the down arrow in the **Housing Status** field and select a housing status from the drop-down list.
14. In the **Enrollment Status** field select one or more enrollment statuses.
15. In the **Cancellation Reasons** field, select one or more cancellation reasons.
16. In the **Program of Study** field, select one or more programs of study. Programs of study do not display when All Schools is selected. This field is dynamic and displays choices based on the school and/or branch campus that was selected.
17. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.

School Portal State Grant Partner Interface

The **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 1 – 4 out of 4 Student Records.**



The screenshot shows the PHEAA School Portal State Grant Partner Interface. The top navigation bar includes 'Search Grants', 'SSN or Last Name', 'Your Account', 'Contact Us', and 'Log Out'. The main header displays 'Alec THE FINANCIAL AID KNOW-IT-ALL' and 'Welcome, JAMES SMITH - Monday, December 8, 2014'. The left sidebar shows 'State Grant Records' with a status summary: Complete - Active (73), Incomplete - Active (2), Complete - Reject (5), Incomplete - Reject (0), Complete - Inactive (0), Incomplete - Inactive (0), and All Statuses (80). The main content area features a 'Filter Records' section with various filters: Record Level Filters (Updated By: Updates by PHEAA/Student, Updated When: 12/2), Special Conditions (- Select -), Term Level Filters (Fall, Winter, Spring), Eligibility Date (From: mm/dd/yyyy, To: mm/dd/yyyy), Reject Types (- Select -), Eligibility Status (- Select -), Credit Info (- Select -), Housing Status (- Select -), Enrollment Status (1 - Full Time Student, 2 - Full Time-Evening, 3 - Half-Time Student, 4 - Less Than Half-Time), Cancellation Reasons (A - Graduated from a Bachelor's, B - Not a High School Graduate, D - Death of Student, E - Cancelled due to Agency Error), and Program of Study (A - 5 Year Co-op Work-Study (All), B - Bachelor's Degree (Religion), C - Bachelor's Degree (All Other), F - 5 Yr Bona Fide Program). Below the filters, it shows 'Results: 1 Records' and 'Displaying 1 - 1 out of 1 Student Records'. A table below the filters displays the student record:

Name/Address	SSN	Award Counter	Fall	Winter	Spring	Academic Year Total
STUDENT, ALDONITA A 1200 NORTH 7TH STREET HARRISBURG, PA 17102	123456789	0.00	Rejected-M Half-time Student Off Campus	Rejected-M Full Time Student Off Campus	Rejected-M Full Time Student Off Campus	

The **Name/Address** field displays the student's name and address on the most recent student record, which may not be the same as the academic year selected.

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

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

The **Award Counter** field displays the total number of terms for all years for which the student has received a State Grant award.

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

School Portal State Grant Partner Interface

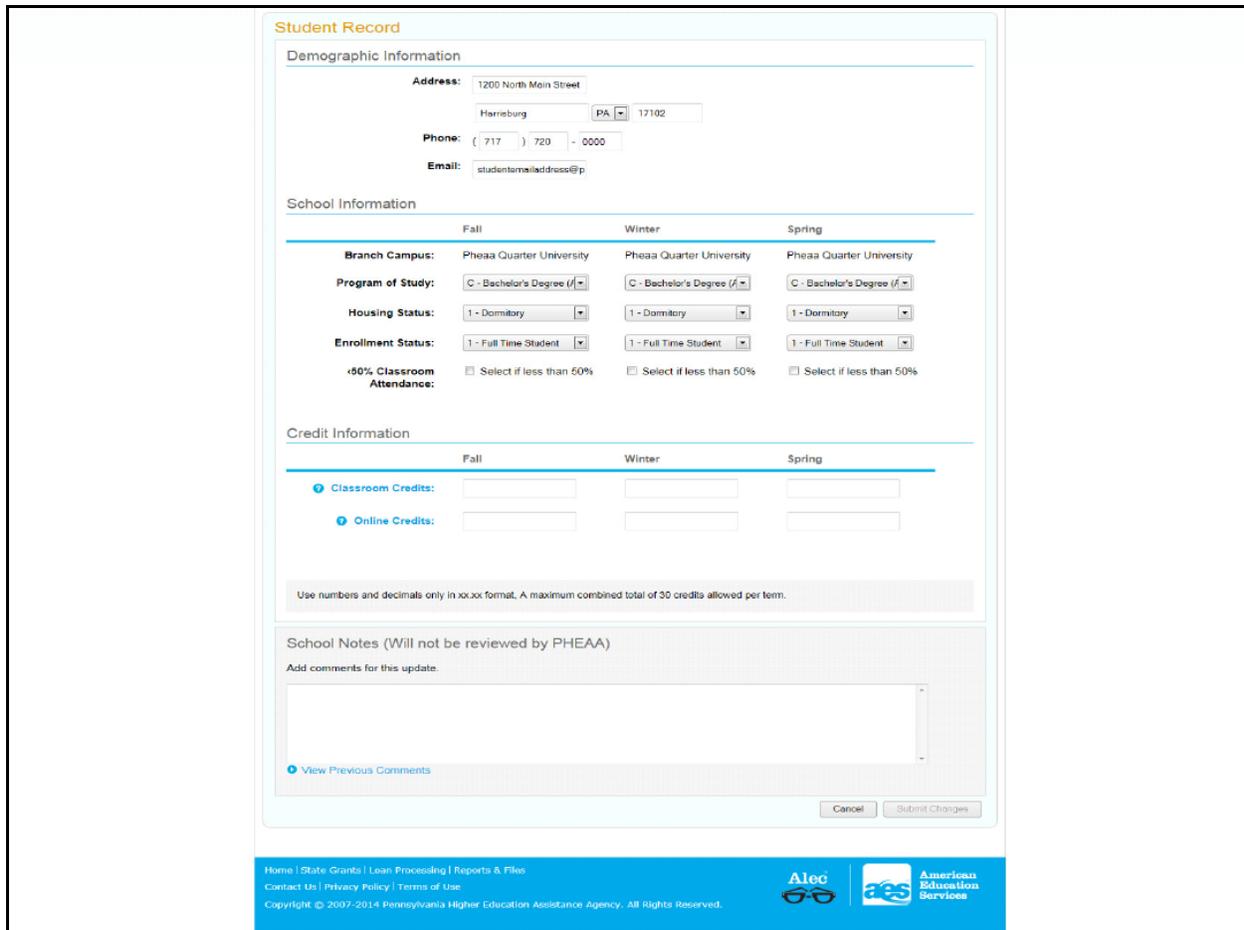
The **Academic Year Total** field displays the total academic year award amount.

18. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Student Records](#) for more information.

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

Update the Student Record for Years Prior to 2018-19

The **Student Record** section displays the fields of the student’s demographic, school and credit information sections open for edit. This section describes the fields that display for years prior to 2018-19.



The **Demographic Information** section displays the student’s demographic information.

1. In the **Address** field, enter the student’s home address. Enter the street address, city and zip code. Click the down arrow to select the state from the drop-down list.
2. In the **Phone** field, enter the student’s 10-digit home telephone number.
3. In the **Email** field, enter the student’s email address.

School Portal State Grant Partner Interface

The **School Information** section displays information about the student's school for all terms in the selected academic year. When the school on the State Grant record is not the same for each term, the school users are permitted only to submit updates for the term associated with their school. All other terms are protected and cannot be updated by school users.

4. The **Branch Campus** field displays the name of the school where the student is attending. This field is updateable only by authorized users at schools that have multiple campuses. To change the student's branch campus, click the down arrow and select a branch campus from the drop-down list.
5. Click the down arrow in the **Program of Study** field and select the student's program of study from the drop-down list.
6. Click the down arrow in the **Housing Status** field and select the student's housing status from the drop-down list.
7. Click the down arrow in the **Enrollment Status** field and select the student's enrollment status from the drop-down list.
8. Click the down arrow in the **Academic Level** field and select the student's academic level from the drop-down list. This field displays for nursing schools only.
9. In the **<50% Classroom Attendance** field, check Select if less than 50% if the student's classroom instruction is less than 50% of his enrolled credit hours.

The **Credit Information** section displays information about the credits the student is attempting for all terms in the selected academic year.

10. In the **Classroom Credits** field, enter the number of credits the student is taking in a classroom.
11. In the **Online Credits** field, enter the number of credits the student is taking online.

NOTE: A **Help** icon displays to the left of the **Classroom Credits** and **Online Credits** fields. Click the icon to display additional information about classroom and online credits.

12. In the **School Notes** field, enter the comments regarding the update, if necessary.
13. 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.

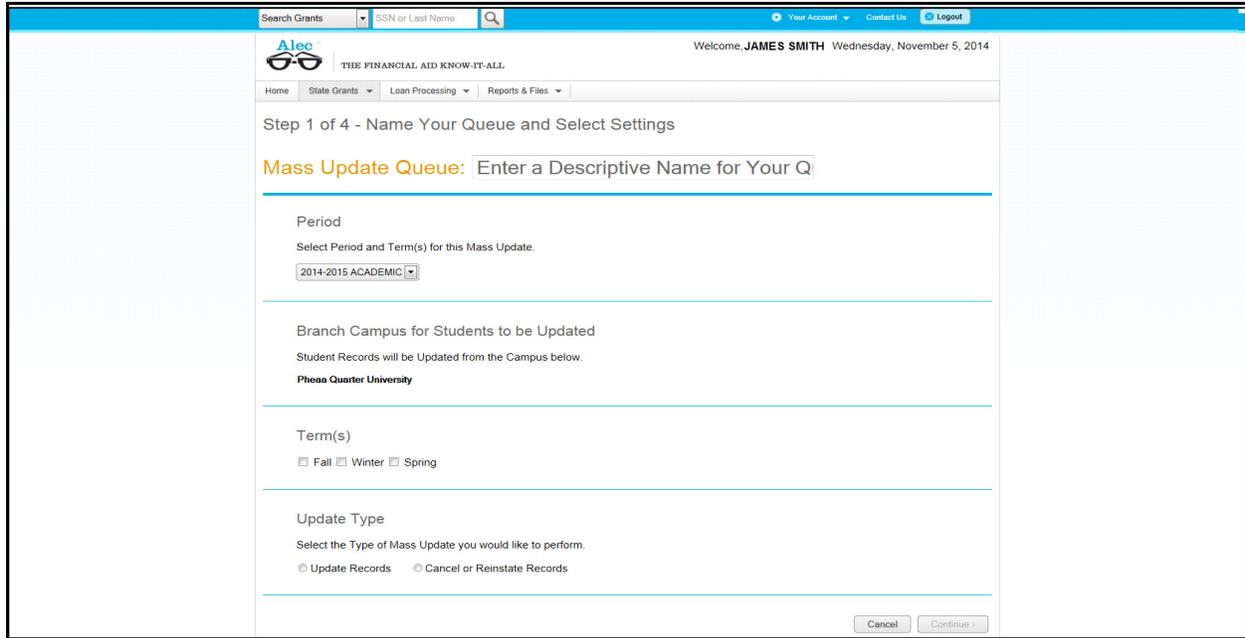
School Portal State Grant Partner Interface

14. Click **Submit Changes** to submit the updates made to the **Student Record** section, or click **Cancel** to close the **Student Record** section without submitting the updates.

Create Mass Update Queue for Years Prior to 2018-19

For years 2014-15 through 2017-18, the creation of a mass update queue includes fields for 50% classroom attendance and credit information.

The **Step 1 of 4 – Name Your Queue and Select Queue Settings** page displays.

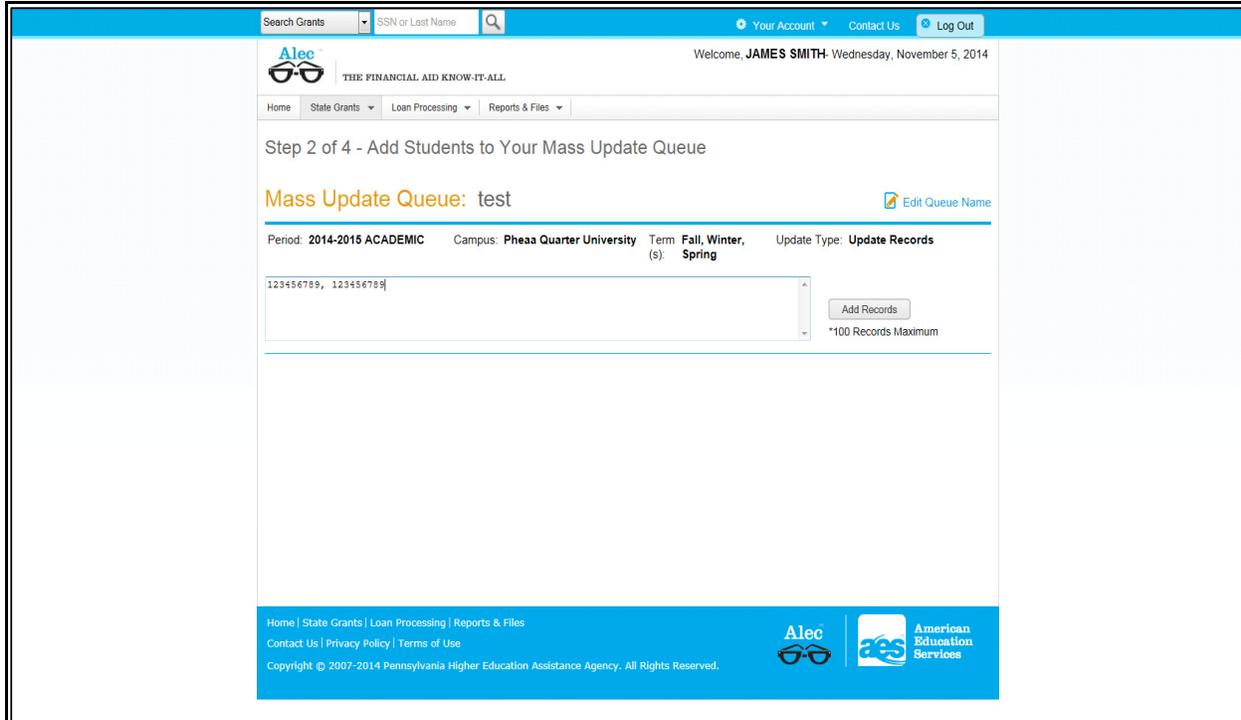


1. In the **Mass Update Queue** field, enter a descriptive name for the queue.
2. In the **Period** field, click the down arrow and select the academic period for the mass update.
3. In the **Branch Campus for Students to be Updated** field, click the down arrow and select the branch campus for which the updates are being made.

NOTE: The **Branch Campus for Students to be Updated** field displays the school branches or corporate headquarters for which the school user is authorized to make updates. Users with authorization for multiple campuses must make a selection.

4. In the **Term(s)** field, check the term(s) for the mass update.
5. In the **Update Type** field, check **Update Records**.
6. Click the **Continue** button.

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

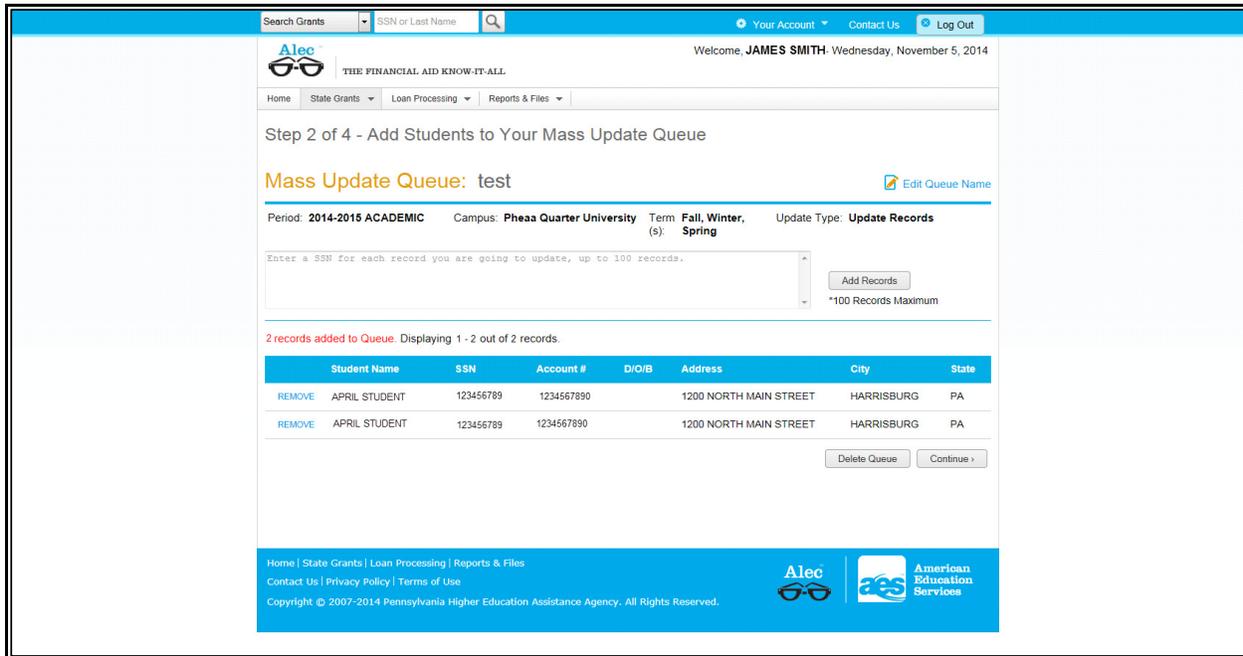


The **Mass Update Queue** field displays the name of the queue entered on the previous page. To change the name of the queue, click **Edit Queue Name**.

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

7. To add records to the mass update queue, enter Social Security numbers for each record that should be updated in the textbox, up to 100 records. The SSN must be numeric and may contain dashes. Use commas, spaces, returns or tabs to separate more than one SSN.
8. Click the **Add Records** button.

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

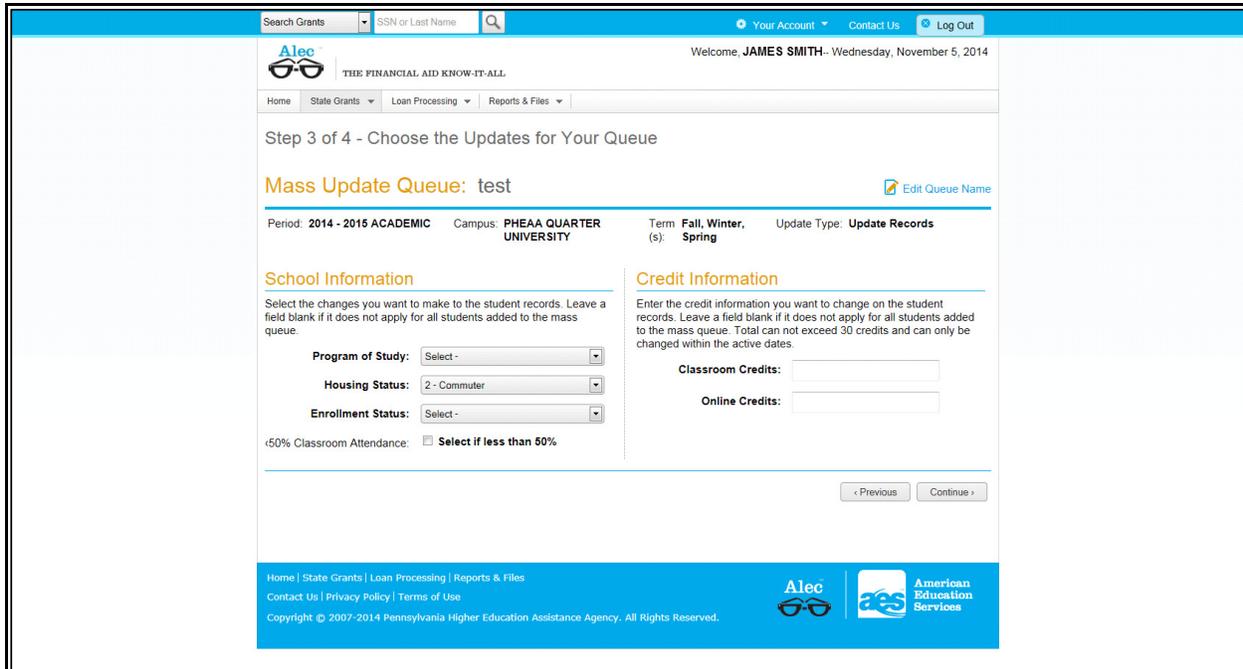


9. To remove records, click the **REMOVE** link to the left of the student record.

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

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 the **Edit Queue Name** link.

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

Updates can be made to school enrollment information and credit information.

School Information

11. In the **Branch Campus Change** field, click the down arrow and select the new branch campus.

NOTE: The **Branch Campus Change** field displays only if the school has more than one branch or corporate headquarters and the school user is authorized to make updates. Users with authorization for multiple campuses may make a selection.

12. In the **Program of Study** field, click the down arrow and select a program of study.

13. In the **Housing Status** field, click the down arrow and select a housing status.

14. In the **Enrollment Status** field, click the down arrow and select an enrollment status.

School Portal State Grant Partner Interface

15. Check **<50% Classroom Attendance** if the student's classroom attendance is less than 50 percent.

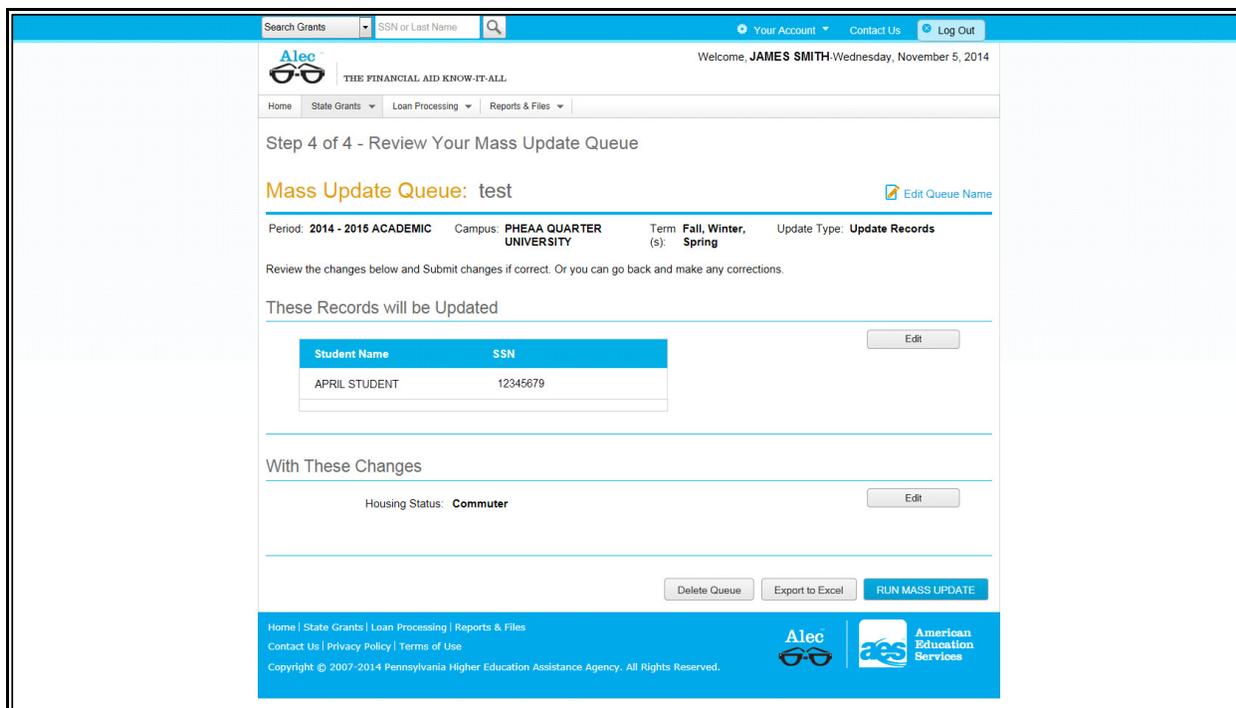
Credit Information

16. In the **Classroom Credits** field, enter the number of registered classroom credits as of the date the State Grant was credited.

17. In the **Online Credits** field, enter the number of registered online credits as of the date the State Grant was credited.

18. Click **Previous** to return to step two, or click **Continue**.

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



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

Welcome, JAMES SMITH/Wednesday, November 5, 2014

Alec THE FINANCIAL AID KNOW-IT-ALL

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Step 4 of 4 - Review Your Mass Update Queue

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

Period: 2014 - 2015 ACADEMIC | Campus: PHEAA QUARTER UNIVERSITY | Term (s): Fall, Winter, Spring | Update Type: Update Records

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

These Records will be Updated

Student Name	SSN	Edit
APRIL STUDENT	12345679	<input type="button" value="Edit"/>

With These Changes

Housing Status: Commuter	<input type="button" value="Edit"/>
--------------------------	-------------------------------------

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

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

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

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

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

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

21. To delete the queue, click the **Delete Queue** button.

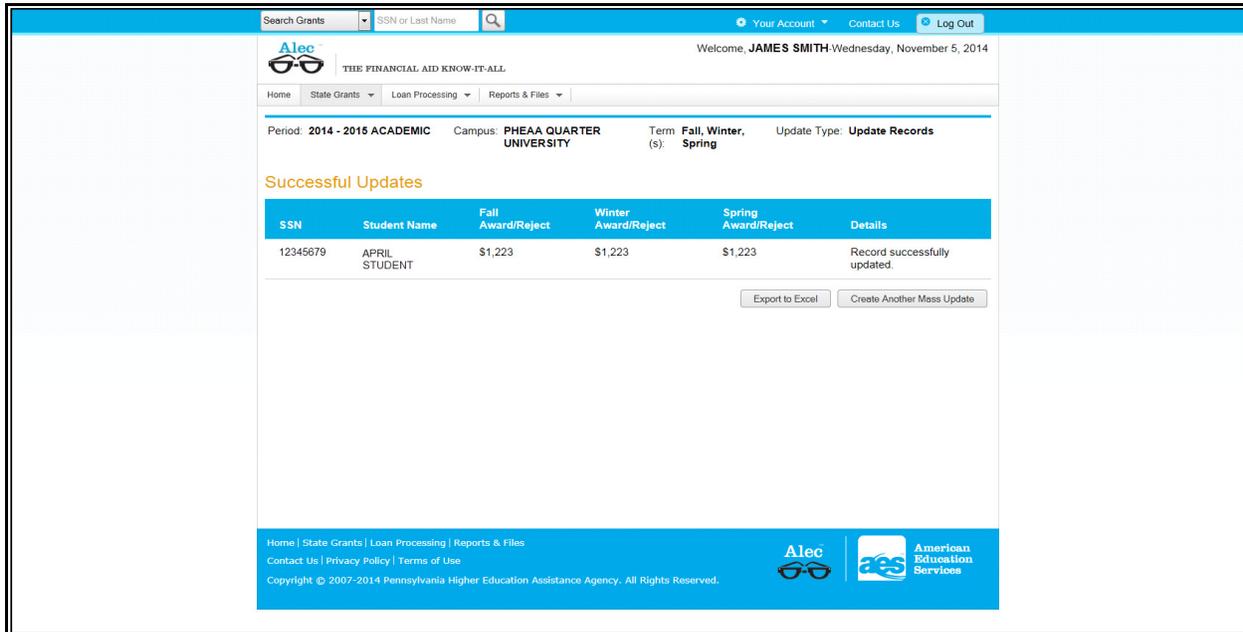
NOTE: A confirmation box, not shown, displays if the school user clicks **Delete Queue**. Click **Yes, Delete Queue** to delete the queue.

School Portal State Grant Partner Interface

22. Click the **Export to Excel** button to export the update criteria to an Excel spreadsheet. See [Appendix B - Export Mass Update Reports to Excel](#) for more information.
23. Click the **Run Mass Update** button to run the update.

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

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



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

- Period:** 2014 - 2015 ACADEMIC
- Campus:** PHEAA QUARTER UNIVERSITY
- Term(s):** Fall, Winter, Spring
- Update Type:** Update Records

Below this information is a section titled "Successful Updates" which contains a table with the following data:

SSN	Student Name	Fall Award/Reject	Winter Award/Reject	Spring Award/Reject	Details
12345679	APRIL STUDENT	\$1,223	\$1,223	\$1,223	Record successfully updated.

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

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

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, not shown, displays a list of accounts that have been updated successfully but the eligibility has not be recalculated and is pending a review by PHEAA.

The **Unsuccessful Updates** section, not shown, 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.

24. Click **View Records Individually**, not shown, to cycle through the records that have not been updated successfully.

25. Click the **Export to Excel** button to export the mass update report to an Excel spreadsheet. See [Appendix B - Export Mass Update Reports to Excel](#) for more information.



School Portal State Grant Partner Interface

26. Click the **Create Another Mass Update** button to create another mass update queue using the instructions in this section.

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

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

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

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