

PHEA TRAINING

Grants Procedure • December 2015

CREDIT REPORTING TIPS

INTRODUCTION

The purpose of this document is to provide the financial aid community with some tips on reporting the required online and classroom credits. Two methods for submitting this information are available: 1) Partner Interface; and 2) Certification Transmissions. This statistical information is required reporting for all awarded students. Please refer to Chapter 3 of the *State Grant Certification Procedures* for additional information regarding this requirement. The *Certification Procedures* are available under State Grant Training at PHEAA.org/training and in the Document Library.

STEPS

Step 1 – Please read the “Attempted Credits Report/Completed Attempted Credits Report” documentation available on PHEAA.org/training before getting started.

Step 2 – Log into PageCenter and use the *Attempted Credits Report* to identify all students who require reporting for the academic period in question.

Step 3 – Report attempted credits via **Partner Interface** or **Certification Transmissions** using the tips noted in this document underneath the corresponding section.

Step 4 – When using **Partner Interface**, the filtering option “Credit Info” may help to narrow down your list of students.

NOTE: Please be aware that there may be some students who are identified on the *Attempted Credits Report* and are not identified when using the “Unreported” selection of the “Credit Info” filtering feature (e.g., students for whom zeroes were incorrectly reported in both online and classroom components of a single term). PHEAA is aware of this, and we are working towards a resolution.

STEP 4a – Select “All Statuses” for the academic year/period you would like to report.

STEP 4b – Under the “Record Level Filters” section, select “Complete/Active” and “Complete/Reject.”

STEP 4c – Under “Term Level Filters,” select “Awarded” under the “Eligibility Status” drop down. Then select “Unreported” under the “Credit Info” drop down.

STEP 4d – Select “Apply Filters.”

STEP 4e – You may cycle through the list and report students individually or export the list to Excel or a CSV-formatted file and then work with the exported spreadsheet using SSNs that share common credit criteria to submit mass updates in Partner Interface.

Incomplete - Active	3233
Complete - Reject	1443
Incomplete - Reject	2025
Complete - Inactive	0
Incomplete - Inactive	73
All Statuses	11435

Record Level Filters

Updated By: Updated When:

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

Special Conditions:

Term Level Filters Fall Spring

Eligibility Date: From: To: Reject Types:

Eligibility Status: Credit Info: Housing Status:

Enrollment Status:
 1 - Full-Time
 2 - Full-Time Evening
 3 - At Least Half-Time
 4 - Less Than Half-Time

Credit Info:
 A - Graduated from a bachelor's
 B - Not a High School Graduate
 D - Death of Student
 E - Cancelled due to Agency Errc
 Not Reported

Program of Study:
 I - College Transferrable Program
 J - 2 Year Terminal Prog-Credits
 K - Prog of Less Than 2 Academi
 P - Non-Spon Clg Transferrable

Results: 11435 Records

STEP 5 – Be sure to log into PageCenter on the next business day after reporting is completed and use the *Attempted Credits Report* to identify any students who may still require reporting for the academic period in question.

NOTE: The *Attempted Credits Report* will generate with the current date if any students still require reporting. If the report date is in the past, there are currently no additional students that require reporting. Be sure to review the report again to identify additional students that require reporting due to late awards.

BEST PRACTICES

1. DO:

- Follow the policy outlined in the Certification Procedures which correspond to the year for which you are reporting data
- Remember that you only need to report data for terms where there is an award
- Adhere to the published deadlines
- Use the daily PageCenter reports to track your population of unreported students
- Monitor your *Attempted Credits Report* in conjunction with your weekly *GPAD* report for newly awarded students
- Report hybrid courses in accordance to their classification

2. DON'T:

- Report credits PRIOR to the term start date and/or confirmation of the student's enrollment for the term
- Report zeros in both online and classroom components for a single term (this is invalid)
- Submit attempted credits via spreadsheets
- Exceed 30 total credits for a single student
- Include "winterim" or intersession term credits if they are not used for fall or spring enrollment purposes
- Re-report attempted credit data for students when there is no change

PARTNER INTERFACE

Navigational tutorials for using Partner Interface to update records both individually (*Update Single Record*) and in mass (*Creating a Mass Update Queue*) are available under Partner Interface Training at PHEAA.org/training.

No Online Enrollment (Zero Online Credits)

1. Report Components Together

Step 1: Group all students that need to be reported by common **Classroom Credits** (6, 12, 15, etc.). Create a mass update queue, **Update Type:** Update Records, for the first group of students that have the same number of **Classroom Credits** in common.

Enter that number in the **Classroom Credits** component of the mass update queue and enter zero in the **Online Credits** component, continue and process the queue. Repeat as necessary, up to 100 records at a time.

Important: You must enter zero when applicable. Blank is unreported.

Step 3 of 4 - Choose the Updates for Your Queue

Mass Update Queue: Fall Credits

 [Edit Queue Name](#)

Period: XXXX-XXXX ACADEMIC

Campus: PHEAA UNIVERSITY OF
HARRISBURG

Term(s): Fall

Update Type: Update Records

School Information

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

Branch Campus Change:

Program of Study:

Housing Status:

Enrollment Status:

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

Credit Information

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

Classroom Credits:

Online Credits:



Step 2: Create a mass update queue for the second group of students that have the same number of **Classroom Credits** in common. Repeat Step 1 until all common groups **Classroom Credits** have been reported.

Online Enrollment

1. Report Components Separately Option

Step 1: Group all students that need to be reported by common **Classroom Credits** (6, 12, 15, etc.). Create a mass update queue, **Update Type:** Update Records, for the first group of students that have the same number of **Classroom Credits**. Enter that number in the **Classroom Credits** component of the mass update queue, continue and process the queue. Repeat as necessary, up to 100 records at a time.

Step 3 of 4 - Choose the Updates for Your Queue

Mass Update Queue: Fall Credits

 [Edit Queue Name](#)

Period: XXXX-XXXX ACADEMIC

Campus: PHEAA UNIVERSITY OF
HARRISBURG

Term(s): Fall

Update Type: Update Records

School Information

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

Branch Campus Change:

Program of Study:

Housing Status:

Enrollment Status:

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

Credit Information

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

Classroom Credits:

Online Credits:

2. Report Components Together Option

Step 1: Group all students that need to be reported by common classroom and online credits. Create a mass update queue, **Update Type:** Update Records, for the first group of students that have the same number of both **Online Credits** and **Classroom Credits** in common.

Enter the number of **Classroom Credits** that the group has in common (6, 12, 15, etc.) in the **Classroom Credits** component and the number of **Online Credits** in the **Online Credits** component of the mass update queue, continue and process the queue. Repeat as necessary, up to 100 records at a time.

Step 2: Create a mass update queue for the second group of students that have the same number of both **Online Credits** and **Classroom Credits** in common. Repeat Step 1 until all common groups have been reported.

Important: You must enter zero when applicable. Blank is unreported.

Step 3 of 4 - Choose the Updates for Your Queue

Mass Update Queue: Fall Credits

 [Edit Queue Name](#)

Period: XXXX-XXXX ACADEMIC

Campus: PHEAA UNIVERSITY OF
HARRISBURG

Term(s): Fall

Update Type: Update Records

School Information

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

Branch Campus Change:

Program of Study:

Housing Status:

Enrollment Status:

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

Credit Information

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

Classroom Credits:

Online Credits:

CERTIFICATION TRANSMISSIONS

State Grant Certification Transmission users can report online and classroom credits on a student by student basis by putting the data in the proper positions. Students do not have to be grouped by commonalities when using transmissions. Transmission layouts are available in the school portal's Document Library under State Grant Program/Technical and Processing Information. Inquiries should be directed State Grant staff via email at sghelp@pheaa.org with the subject line 'Certification Transmissions.'

Classroom Credit Positions

Field Name	Position	Length	Type	Format
Fall Attempted Classroom Credits	89	5	N	xxxxx (ex. report 12 credits as 01200)
Winter Attempted Classroom Credits	94	5	N	xxxxx (ex. report 12 credits as 01200)
Spring Attempted Classroom Credits	99	5	N	xxxxx (ex. report 12 credits as 01200)

Online Credit Positions

Field Name	Position	Length	Type	Format
Fall Attempted Classroom Credits	104	5	N	xxxxx (ex. report 12 credits as 01200)
Winter Attempted Classroom Credits	109	5	N	xxxxx (ex. report 12 credits as 01200)
Spring Attempted Classroom Credits	114	5	N	xxxxx (ex. report 12 credits as 01200)

Important: You must enter zero ONLY when applicable, as blank fields will be treated as unreported. Also, do not re-report attempted credit data for students when there is no change. This clutters the student's activity log and creates additional manual work for PHEAA staff.

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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