2022-23 Academic Year and 2023 Summer Term

Pennsylvania State Grant Program Workshops

June-July 2022

Getting Technical with PA State Grants
Housekeeping
PA State Grant & Special Programs (SGSP) staff welcome attendees, review the agenda, and explain how attendees should access event materials.

Presentation
Attendees receive an overview of the program policy as set forth by the 2022-23 PA State Grant Program Handbook.

Wrap-Up
PHEAA staff will issue reminders, provide additional resources, and share responses to questions posed during the session by attendees.

This content has been abridged and does not supersede current program policy. For complete guidance on program administration, please refer to the appropriate year PA State Grant Handbook.
Objective

Gain a greater understanding of the technical resources involved with administering the PA State Grant Program

• During this session, presenters will:
  – Highlight the system that is used to manage overall access
  – Review the various systems that reside within the School Portal (Alec)
  – Discuss the system that students may use in establishing and reviewing their PA State Grant eligibility
  – Share resources that identify the technical specifications required and assist with overall system comprehension
Business Partners Access Management System (BPAMS)

• Database and Web interface used to grant and manage external users who need access to PHEAA systems

• School must have a current Remote Access Agreement (RAA) on file with PHEAA

• Authoritative Source (AS) controls access for the school
  – Access levels are both institution-specific and user-specific
    • Users should only be granted access specific to their duties associated with the specific programs they administer
  – Yearly access review must be completed ahead of the deadline to avoid suspension or termination
  – To report a new AS, complete the Request for Authoritative Source Status Form

• Users may not share credentials

Contact information in BPAMS does not carry over to other PHEAA records. Program contacts must be updated in Partner Interface as well.
School Portal (Alec)

- Accessible via PHEAA.org/training
  - Requires valid user credentials to access
    - Users with access to federal data may be required to enter token information
    - Access will not be interrupted even if disbursements are on hold
- School Portal landing page will allow access to multiple applications
  - Messages section features important reminders from PHEAA (e.g., deadlines, training events, etc.)
Partner Interface – Dashboard

- State Grants Dashboard groups records based on record status and features a summary of the student records that were updated within the previous three weeks
  - A total of 7 record statuses available
    - Record status determined at a record level, not term level
      - Record is categorized as a reject if at least one term is in a reject status, unless reject reason is E, M, or Y
    - **All Statuses** lists all student records (excluding Not Enrolled)
    - **Updates By** captures all updates even if they do not result in an eligibility change
Partner Interface – Filters

• Record- and term-level filtering can be performed from one of the student lists and may be combined
  – Record Level Filters allow selection of records by origin/date of update, record statuses, and other special conditions
  – Term Level Filters allow selection of records by term status (e.g., Eligibility Date, Eligibility Status, Reject Reason, etc.)
    • Using ANY means “this term OR that term” while ALL means “this term AND that term”
  – Recommend using “All Statuses” so that results are not limited to students within a specific category

• Create custom lists of incomplete or reject records to perform student outreach (e.g., Reject T, Reject U, etc.)
  – Perform outreach ahead of application deadlines and/or the student reconsideration deadline

Check out the Partner Interface Filtering Tips for additional explanations, tips, and tricks.
• Mass Update Queues can be developed to expedite reporting efforts (e.g., progress rejects, enrollment mode, etc.)
  – Not all reporting options are available in mass (e.g., cost overrides)
  – Limit the number of students in a single queue to no more than 100
  – PHEAA does not retain a history of mass updates

• Users can export student records from the State Grant Dashboard or filtered lists
  – Exports are user specific and cannot be viewed by others
  – Exported lists can be imported into your financial aid management system (FAMS) or manually reviewed for further analysis and outreach
  – The status of each export can be tracked on the School Portal landing page
• **Eligibility Summary** provides current and prior-year historical eligibility and award counter information

• **Special Request** allows for change requests that cannot be submitted via other update options

• **Drop Down Update Options** provide the ability to make updates to a student’s enrollment and eligibility

• **Award Information** displays student and grant information

• **School Notes** displays a history of internal comments added by the school

• **Activity Log** documents incoming and outgoing correspondence/record updates

• **Application Info** displays most recent application information that the student provided when applying
  – Red dot indicates the student’s application is incomplete
**Partner Interface – School Profile**

- School Profile features demographic information and an institutional activity log
  - Contact PHEAA if demographic information needs updated
  - Activity log documents most interactions between PHEAA and the school

- Institutional contacts for PA State Grant can now be managed via Partner Interface
  - Primary contact required and cannot be deleted
  - Multiple secondary contacts and other contact types can be added (e.g., President)
  - Contact updates for other PHEAA-administered programs not listed in Partner Interface, must be emailed to the program mailbox

- Additional school data (e.g., school statistics, educational costs, etc.) expected to be added to the School Profile in the coming months
Partner Interface – Disbursement Summary

• Replicates information from FG3S in OC/WebConnect
  – Processed refunds will reflect in real-time
  – All other fields (e.g., total awards, disbursement amounts, etc.) refresh nightly

• Use summary during reconciliation to monitor refunds due PHEAA or balances due your institution
Partner Interface – Roster & Refund Cards

Roster Cards
- Snapshot of each roster (i.e., pre-disbursement, term disbursement, or reconciliation) sent
- Cannot certify rosters before reported term start date occurs
- Institution must determine who will have responsibility for certifying rosters
- Roster certification indicates eligibility has been verified, corrections have been submitted, and award certification and crediting occurred, if applicable

Refund Cards
- Provide convenient method for verifying PHEAA’s posting of a refund
- Includes refund date, refund amount, and refund source

When remitting a refund, designate PHEAA as the payee. Additionally, if the refund is a general PA State Grant refund, email sghelp@pheaa.org when the payment has been sent. If for a Program Review, email programreview@pheaa.org.
PageCenter

- Secure Web-based repository used to access PHEAA-generated reports
- Authorized users can view, print and save reports, as well as email information, or convert data into an alternative format (e.g., word, excel, etc.)
  - Access to report folders (applications) managed via BPAMS
- Users can request email notification when reports are issued
- Search options available to assist in locating specific reports
  - Appendix B of the 2022-23 PA State Grant Handbook details all PA State Grant-related reports available in PageCenter
  - Tip sheets and guides available on PHEAA.org/SGSPResources
- Microsoft Edge is the current recommended browser
  - Use Microsoft Edge in Compatibility Mode to view all generated documents
    - Process must be repeated every 30 days until a permanent solution is available
• Java-based Web interface used to access the PHEAA mainframe (green-screens) for select programs
  – Minimum system requirements are documented in the OC/WebConnect User Guide and may need to be reviewed with Information Technology (IT) staff at your institution

• Navigation within the system requires use of specific display commands
  – Shortcut keys may also assist in navigation between displays
  – A list of the PA State Grant Transactions is available online
    • Some student and institutional data elements are only viewable within OC/WebConnect

FG50 of OC/WebConnect provides grand total statistics of each reject reason for the general population of PA State Grant applicants at your school for the year and period selected.
Document Library

- Online library that houses memoranda, technical resources, and other program materials
- Most documents are available in PDF format for download and print
- Resources organized by program, document type, and award period
  - Documents may be removed once the program retention period expires
- Select program resources only available via Document Library (e.g., Forms Provided to the Aid Community Only)
• Web-based product that allows for the sharing and transferring of files between PHEAA and external partners

• Files are encrypted and encryption software is required
  – Information Technology resources at your school may be required to support use of this process

• Files are exchanged via secure mailboxes
  – PHEAA uploads files for users to download
  – Users can upload corresponding data files to provide student updates for PHEAA use
    • Users may need to email PHEAA to advise when files are available for retrieval
    • Once a file is uploaded, users cannot delete the file
• Flat files exchanged between PHEAA and institutions containing student-level data

• IT support on the postsecondary end may be necessary
  – Process requires Pretty Good Privacy (PGP) encryption technology
  – Annual set-up and testing required before PHEAA will process any updates
    • PHEAA annually publishes file layouts and sample files to the Document Library for system configuration
    • Testing may take time and should be accounted for each year
    • Re-testing may need to occur when the school has system upgrades or changes
Transmissions

• School determines which, when, and how transmissions will be used
  – Should be used in conjunction with Partner Interface

• Status Transmission
  – Outbound weekly flat file dataset from PHEAA to the school that provides student-level enrollment data and PA State Grant record status for all students at the school
  – Features comparable information as FAA Status Listing
  – Can be used to track weekly eligibility changes, monitor incompletes or students under review, and more

• Disbursement Transmission
  – Outbound standard flat file dataset from PHEAA to the school that is an electronic version of the disbursement roster
  – Can be used to perform certification of student awards
  – Also utilized by schools participating in the PA Ready to Succeed Scholarship (RTSS) Program to provide the equivalent of the “Awarded Needs Certification” listing in Partner Interface

• Certification Transmission
  – Inbound standard flat file from the school to PHEAA to submit enrollment and eligibility data corrections
  – Can be used to report a variety of new enrollment and eligibility updates
  – Reports provided after each transmission to summarize successful and unsuccessful updates and which record updates require a Special Request
Scenario: Technical Resources

- Barbara Howard is the Director of Financial Aid and Authoritative Source at PHEAA State College
- Janine Teagues is a new Assistant Director of Financial Aid who will also have the primary responsibility of administering the PA State Grant Program
- The school issues nearly 600 PA State Grant awards each year but has noticed that their number of recipients has decreased over the last few years

Questions:
- If Barbara is set to retire during the Spring 2023 term, what are some items that should be updated with PHEAA?
- Given the number of students that receive a PA State Grant award each year, how can the school maximize their reporting and record upkeeping efforts?
- If the school wants to perform outreach to students that are not awarded a PA State Grant, how can they obtain a list of students?
Scenario: Technical Resources

Answers:

- If Barbara is set to retire, the school should:
  - Identify and report a new Authoritative Source
  - Report contact updates for the PA State Grant Program (and any other PHEAA-administered programs), if necessary
  - Determine who will handle any PA State Grant-related duties that Barbara previously completed (e.g., educational cost collection, reconciliation, etc.) and train the responsible party

- To maximize their record upkeeping and reporting efforts, the school could:
  - Use Mass Updates in Partner Interface
  - Begin using transmissions to send and receive enrollment and eligibility updates. To get started with using transmissions, the school would reach out to Public_Service_Systems@pheaa.org

- To get a list of students that are not awarded, the school should use the various filters options in Partner Interface to identify their target population (e.g., Reject L, etc.)
Account Access

- PHEAA’s online account management tool for students
  - Accessible through American Education Services (AES)
- Will be used by students to:
  - Submit the PA State Grant Form (SGF) or apply for the Summer PA State Grant
  - Make updates to demographics or enrollment information
  - Submit information back to PHEAA for review
  - View eligibility messaging for select programs and/or loans
- Postsecondary institutions can view student information in Account Access
  - Updates may only be submitted by the student
  - Copies of correspondence sent to the student are not housed in Account Access
File Upload for Students

- PA State Grant applicants can now return requested documents and forms to PHEAA electronically
- Feature available within Account Access
  - Compatible with a computer, tablet, or smart phone
- Student selects File Upload, chooses “PA State Grant” as the reason, and selects the appropriate category
  - [File Upload User Guide](#) provides guidance on which category should be selected when submitting requested documents and forms
  - Up to 10 documents can be submitted through a single upload with a maximum size of 5 MB per file
  - Documents will be received by PHEAA within 24-48 hours after submission

Documents for the PHEAA-administered Special Programs should **not** be submitted via File Upload at this time. PHEAA will communicate when materials for these programs can be returned via this method.
Reminders

• Encourage students to maintain updated demographic and enrollment information via Account Access

• User Guides, tip documents, and other companion resources are available for students and schools on PHEAA.org and in the Document Library
  – Share your resource recommendations with PHEAA

• Additional resources may be necessary for successful administration of the PA State Grant Program (e.g., award estimators, credit hour converter, etc.)

• Review technical issues with your IT resources first and then escalate to PHEAA staff as necessary

• Include technical training of the PHEAA systems when conducting your internal training efforts
  – Include references to available PHEAA resources in your policies and procedures manual to help others who may be unfamiliar
Additional Reminders

• 2021-22 Academic Year and Summer Term awarding, disbursement, and reconciliation are underway
  – Complete reconciliation by the announced deadlines to avoid disbursement holds and program review findings

• 2022-23 PA State Grant awards finalized with passage of the Commonwealth budget
  – Maximum award will be $5,750

• Order the 2022-23 PA State Grant Handbook via PHEAA.org/Order-Online
  – Post-workshop Q&A released in the fall

• Keep institutional contacts up-to-date via Partner Interface
Resources

Connect With Us!

sghelp@pheaa.org

1.800.443.0646, Option 3, Option 1

PHEAA Sponsored Events & Other Financial Aid Events

PHEAA.org
Thank You!