

BPAMS

FOR REQUESTORS, USERS AND
THE AUTHORITATIVE SOURCE



NOTES:

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Introduction

The Business Partner Access Management System (BPAMS) is a Lotus Notes database and Web interface that is designed to manage requests for access to PHEAA systems. With this application, business partners—their users, requestors and their Authoritative Source(s)—can submit requests for access to PHEAA systems.

This document describes the procedures for managing request for user profiles, including submitting, approving, denying and canceling requests, terminating profiles, completing a user access review.

Understanding the Business Partner Access Management System Workflow

User IDs are granted to persons who need access to PHEAA systems. The ability to request a user ID is not restricted. Requestors who do not possess a user ID can submit a request for themselves without logging in to the Business Partners Access Management System by clicking Create an Account on the Business Partners Access Management System Login page.

The Authoritative Source and users already possessing a user ID can submit a request on behalf of someone else by clicking New Profile on the Business Partners Access Management System navigation menu after they have logged into the Business Partners Access Management System.

When the request is submitted, a request number is assigned. Users with access to the Business Partners Access Management System can use this number to go directly to the pending access request.

Requests for access are submitted at the time a request for a new profile is submitted; however, if additional access is needed, users can log into the Business Partners Access Management System to submit a request for access. Likewise, when access to a particular resource is no longer needed, the user can submit a request to remove the access.

When a user ID and profile are no longer needed, the Authoritative Source can submit a request to terminate the user's ID and profile. Once a user ID and profile are terminated, all access to PHEAA resources is revoked.

To request a new user profile, refer to the [Submitting a Request for a New User Profile](#) section of this user guide. To log into the Business Partners Access Management System with a valid user ID, refer to the [Logging into the Business Partner Access Management System](#) section of this user guide.

Roles in the Business Partner Access Management System

The following are key roles in the Business Partners Access Management System.

Requestors: Do not possess user IDs. Submit requests to obtain user IDs in order to access agency-owned resources.

Users: Possess user IDs. Users submit requests to add or change access and to search for and track pending requests in the Business Partners Access Management System workflow.

Authoritative Sources: Responsible for the access privileges of the users within their organization. The Authoritative Source may submit requests for a new profile and access privileges on behalf of a user who does not have access to the Business Partner Access Management System.

Business Unit Approvers: PHEAA's approvers before access requests are sent to the Enterprise Security Office to be completed.

Enterprise Security Office (ESO): Controls access to PHEAA systems. Once requests are approved by the institution's authoritative source(s) and PHEAA's business unit approver(s), Enterprise Security Office staff completes the access request. This may include assigning or terminating user IDs and granting or revoking access to PHEAA systems.

This document is intended for requestors, users and the authoritative source.

Logging into the Business Partner Access Management System

Users with access to the Business Partner Access Management System and the Authoritative Source can access the Business Partner Access Management System from an Internet browser or from a notification email link.

Using an Internet browser, users and the Authoritative Source access the Home page where they can create and submit a request for a new user profile. Users and the Authoritative Source can log into the Business Partner Access Management System to submit requests for access or to search for and track pending requests.

Once a request is submitted, the Business Partner Access Management System sends notification emails to the next assignee in the Business Partner Access Management System workflow. These emails contain links to the request for which they were sent. Users and the Authoritative Source can use these links to access the Business Partner Access Management System and go directly to the request without searching for it.

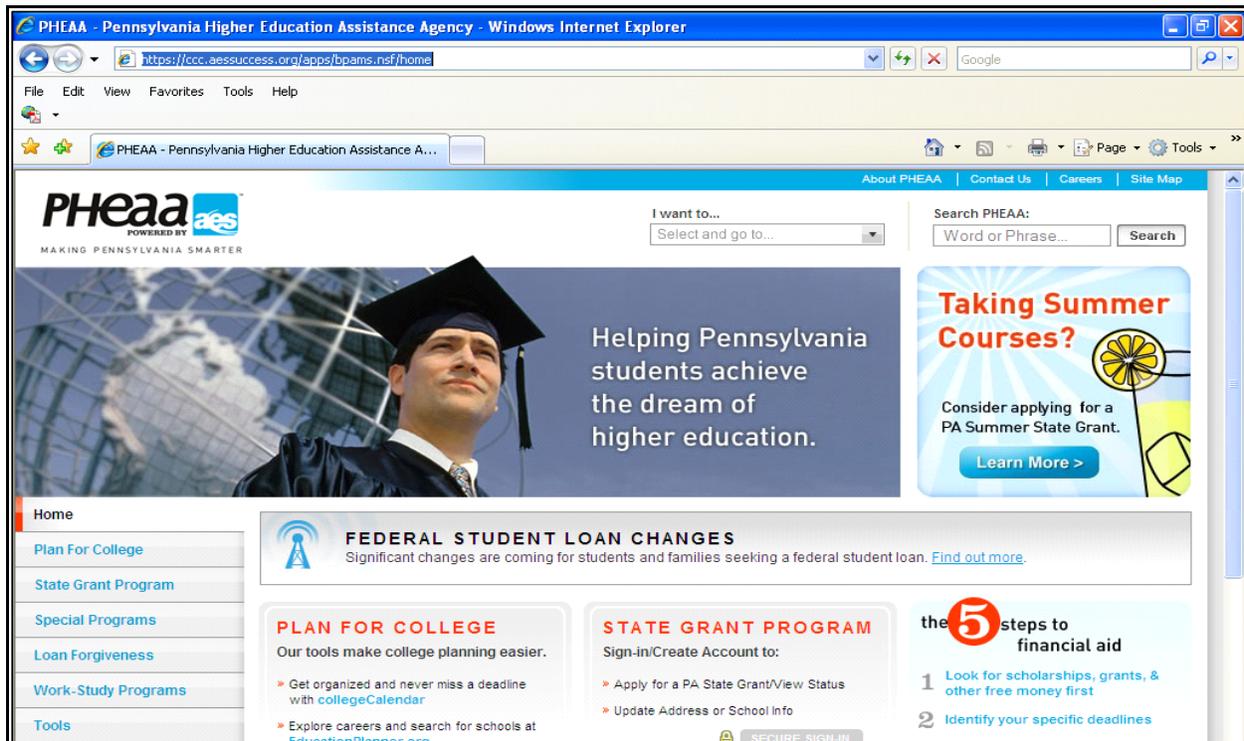
To access the Business Partner Access Management System using an Internet browser, see [Using an Internet Browser](#) for more information.

To access the Business Partner Access Management System using a notification email link, see [Using a Notification Email Link](#) for more information.

NOTE: The Business Partner Access Management System terminates a user's session after 10 minutes of inactivity.

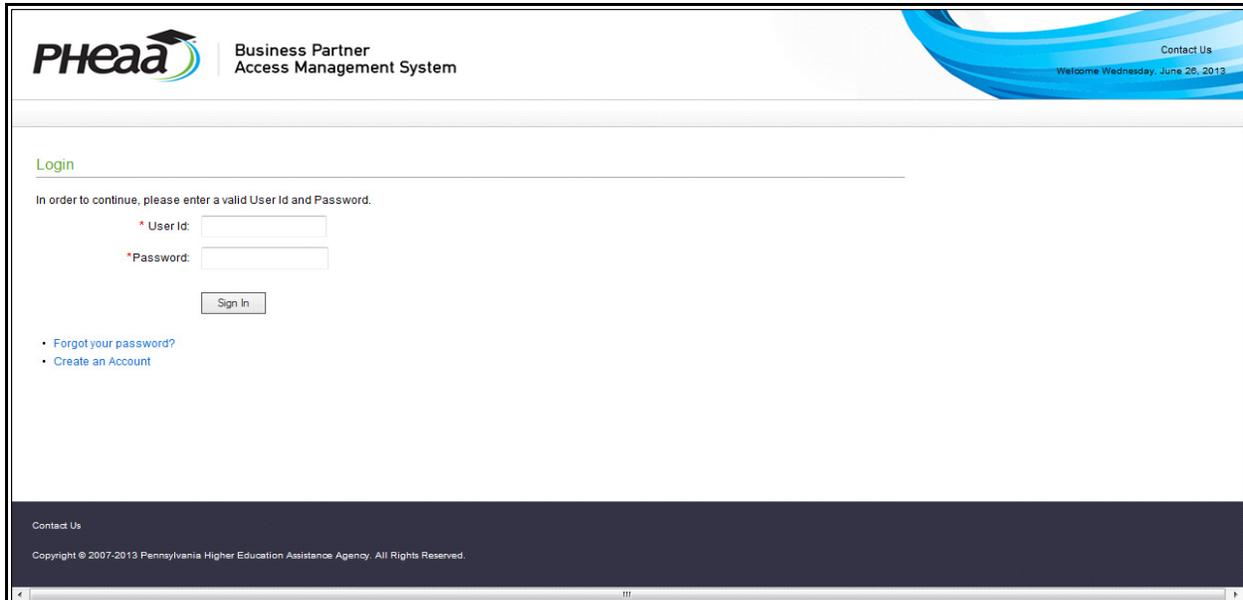
Using an Internet Browser

Follow these steps to log into the Business Partner Access Management System using an Internet browser.



1. Open an Internet browser on a PC connected to the Internet.
2. Enter the following URL to access the Business Partner Access Management System:
<https://ccc.aessuccess.org/apps/bpams.nsf/home>
3. Press Enter.

The **Business Partner Access Management System Login** page displays.

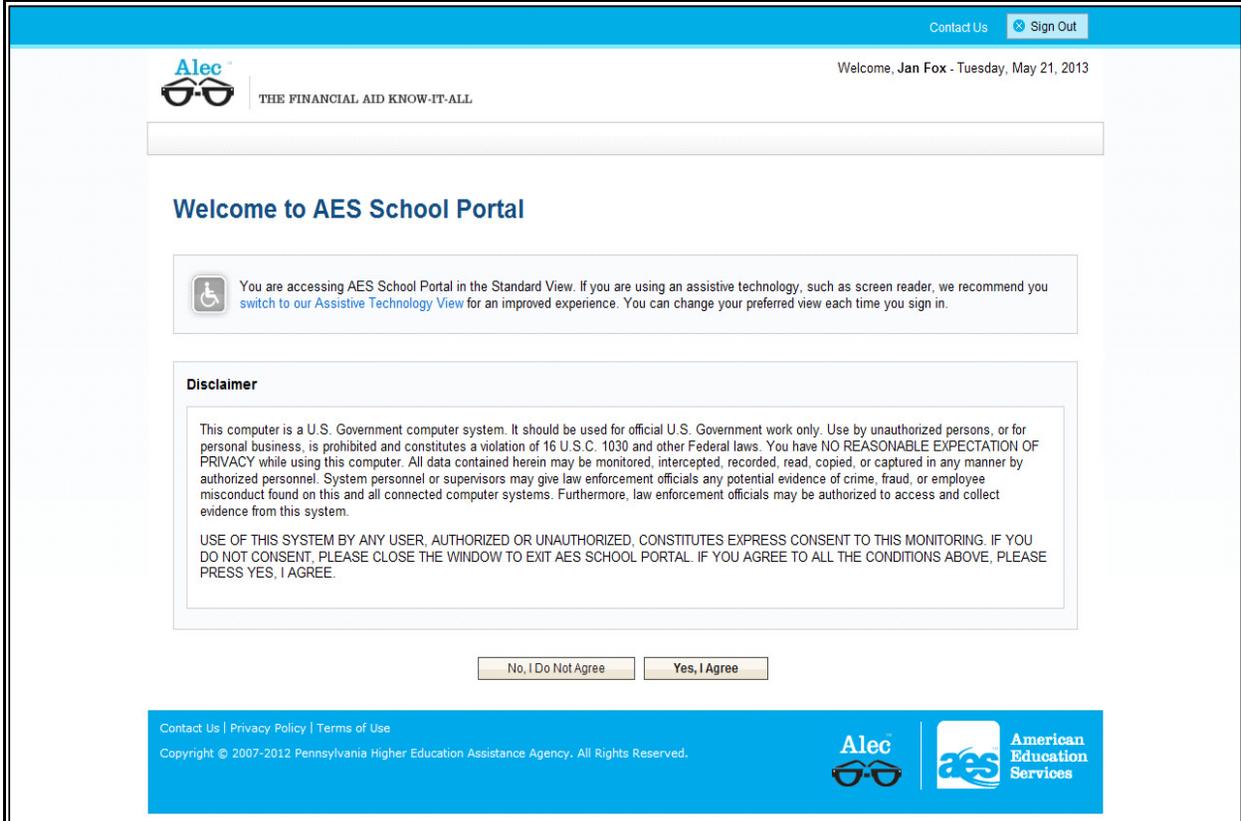


The screenshot shows the login page for the Business Partner Access Management System. The page features the PHEAA logo and the system name in the top left. A blue decorative banner in the top right contains a 'Contact Us' link and the date 'Welcome Wednesday, June 20, 2013'. The main content area is titled 'Login' and includes a prompt: 'In order to continue, please enter a valid User Id and Password.' Below this are two input fields: '* User Id:' and '* Password:'. A 'Sign In' button is positioned below the password field. At the bottom left of the main area, there are two links: 'Forgot your password?' and 'Create an Account'. The footer contains a 'Contact Us' link and the copyright notice: 'Copyright © 2007-2013 Pennsylvania Higher Education Assistance Agency. All Rights Reserved.'

4. In the **User Id** field, enter a valid RACF ID.
5. In the **Password** field, enter a valid password.
6. Click **Sign In**.

NOTE: Click **Forgot your password?** to reset the password. Click **Create an Account** to create a new user profile. See [Submitting a Request for a New User Profile](#) for step-by-step instructions.

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

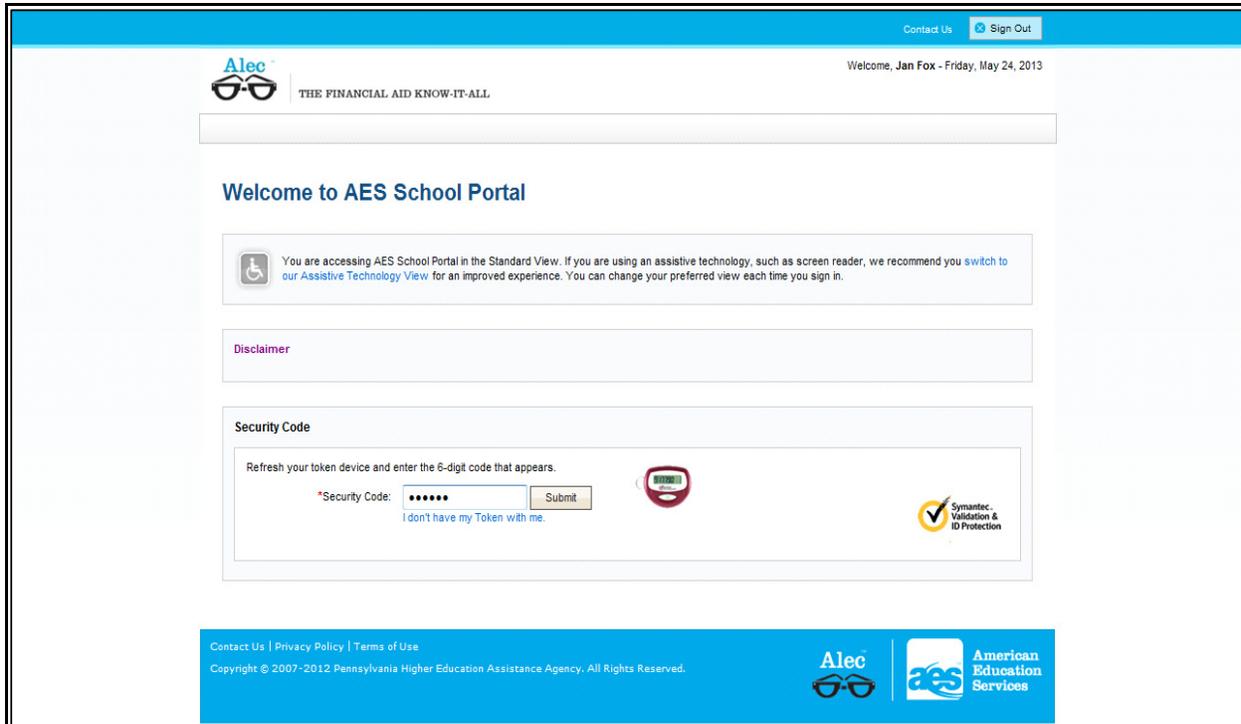


The screenshot shows the "Welcome to AES School Portal" page. At the top right, there are links for "Contact Us" and "Sign Out". The main header includes the "Alec" logo with the tagline "THE FINANCIAL AID KNOW-IT-ALL" and a welcome message: "Welcome, Jan Fox - Tuesday, May 21, 2013". Below the header is a search bar. The main content area features a "Welcome to AES School Portal" heading, followed by 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." 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 are two buttons: "No, I Do Not Agree" and "Yes, I Agree". The footer contains links for "Contact Us", "Privacy Policy", and "Terms of Use", along with copyright information: "Copyright © 2007-2012 Pennsylvania Higher Education Assistance Agency. All Rights Reserved." and logos for "Alec" and "American Education Services".

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

7. Click **Yes, I Agree** to continue.

The **Welcome to AES School Portal** page redisplay if the user has access to federal data.



The screenshot shows the AES School Portal login interface. At the top, there is a navigation bar with "Contact Us" and "Sign Out" links. Below this, the Alec logo and tagline "THE FINANCIAL AID KNOW-IT-ALL" are displayed on the left, and the date "Welcome, Jan Fox - Friday, May 24, 2013" is on the right. The main heading is "Welcome to AES School Portal". Below the heading 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." This is followed by a "Disclaimer" section. The "Security Code" section contains the instruction "Refresh your token device and enter the 6-digit code that appears." Below this is a form with a "Security Code" field (displayed as six dots), a "Submit" button, and a link that says "I don't have my Token with me." To the right of the form is a Symantec logo with the text "Symantec Validation & ID Protection". 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.

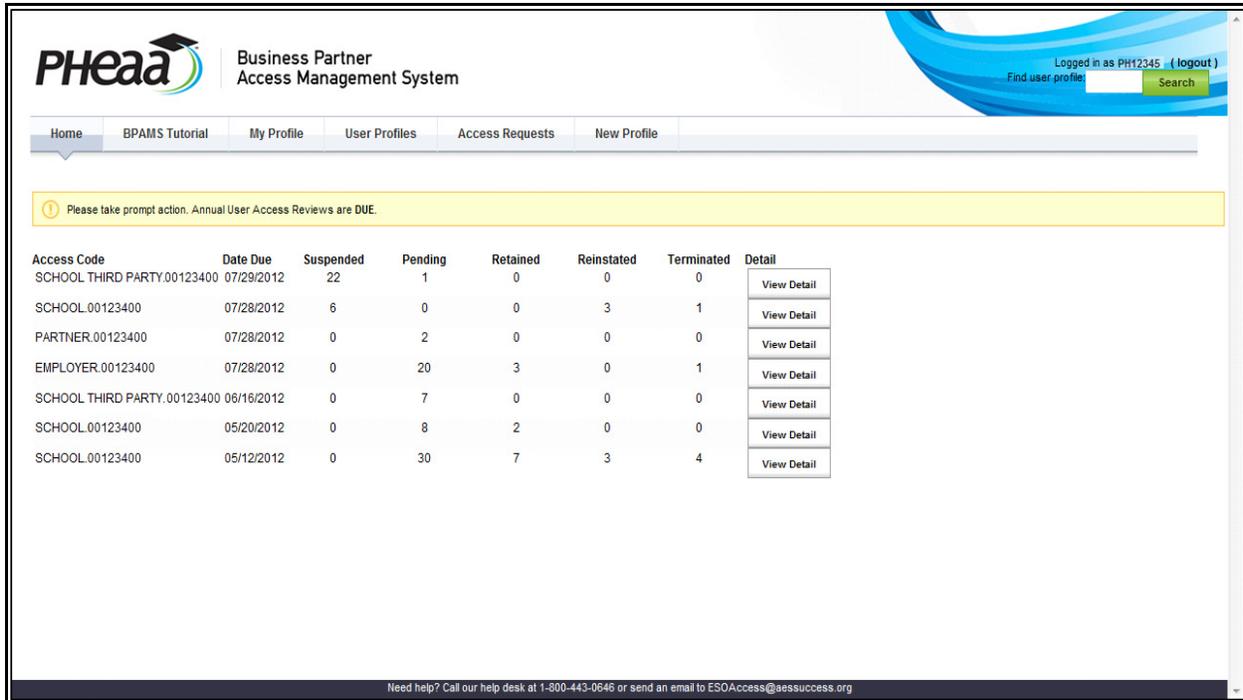
8. Refresh the token device.
9. In the **Security Code** field, enter the six-digit security code that was generated by the token device.

NOTE: Users who have a registered token but do not have it available can request a temporary security code. Click **I don't have my Token with me**. See user guide **WB0120-Web Login & Authentication for Partners_User Guide_AES** for more information.

10. Click **Submit**.

The **Business Partner Access Management System Home** page displays.

A navigation menu displays at the top of the home page to take the user to those pages and links to the systems for which they have access. The links that display depend on the user's level of access. Links available to the user may not be the same as the links available to the Authoritative Source.



Business Partner Access Management System

Logged in as PH12345 (logout)
Find user profile: Search

Home | BPAMS Tutorial | My Profile | User Profiles | Access Requests | New Profile

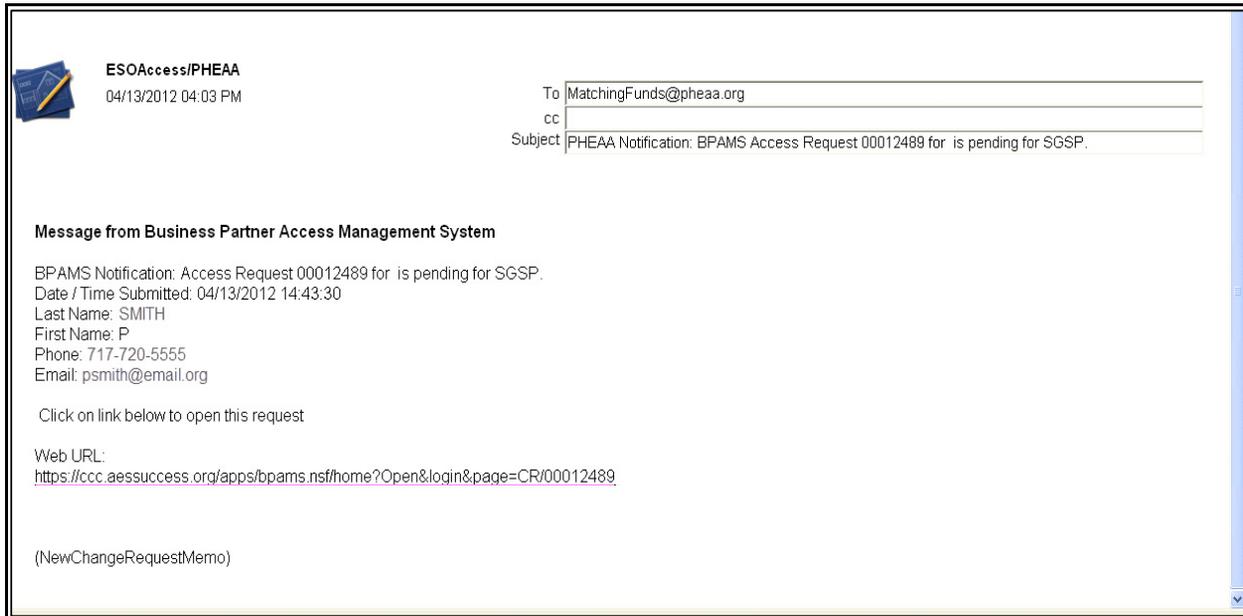
! Please take prompt action. Annual User Access Reviews are DUE.

Access Code	Date Due	Suspended	Pending	Retained	Reinstated	Terminated	Detail
SCHOOL THIRD PARTY.00123400	07/29/2012	22	1	0	0	0	View Detail
SCHOOL.00123400	07/28/2012	6	0	0	3	1	View Detail
PARTNER.00123400	07/28/2012	0	2	0	0	0	View Detail
EMPLOYER.00123400	07/28/2012	0	20	3	0	1	View Detail
SCHOOL THIRD PARTY.00123400	06/16/2012	0	7	0	0	0	View Detail
SCHOOL.00123400	05/20/2012	0	8	2	0	0	View Detail
SCHOOL.00123400	05/12/2012	0	30	7	3	4	View Detail

Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

Using a Notification Email Link

The Authoritative Source can access the Business Partner Access Management System from a notification email link.



1. Open the email account and select the Business Partner Access Management System notification email from the Inbox.

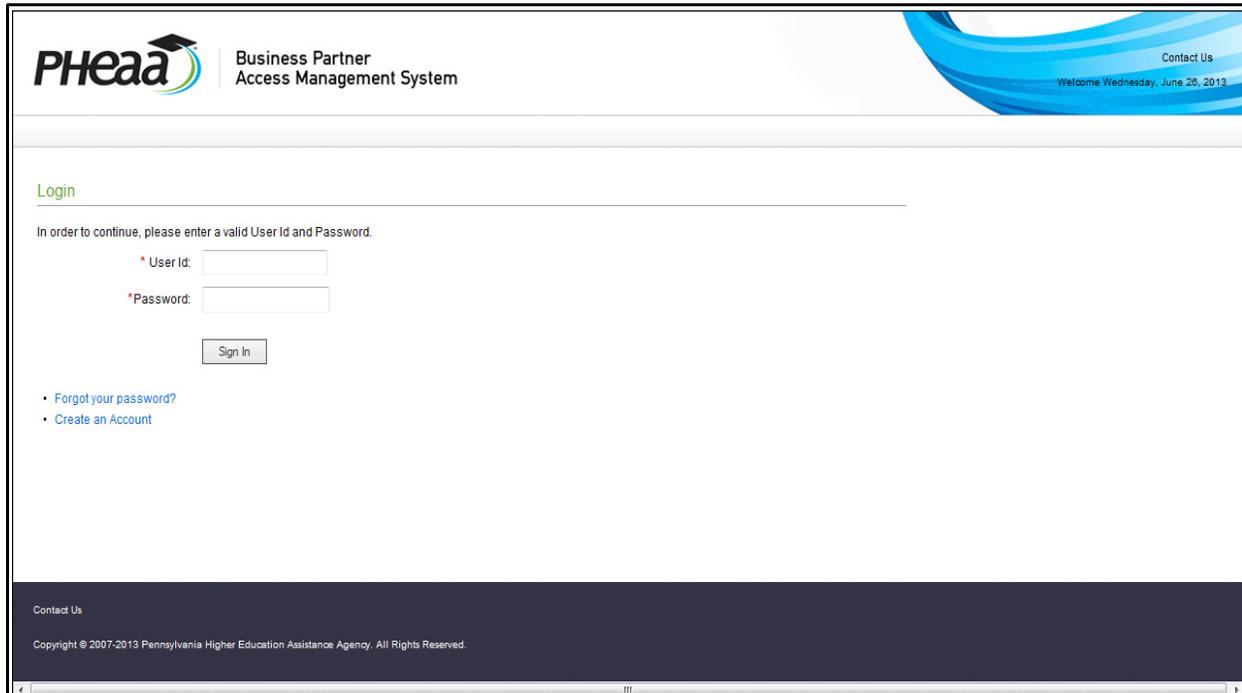
NOTE: The sender's name in the email Inbox depends on from where in the workflow the email was sent.

2. Click the link in the body of the email.

NOTE: The email link is specific to a request. When a user clicks on a notification email link, they are taken to a specific access request. The request number displays at the end of the email link.

The **Business Partner Access** login page displays.

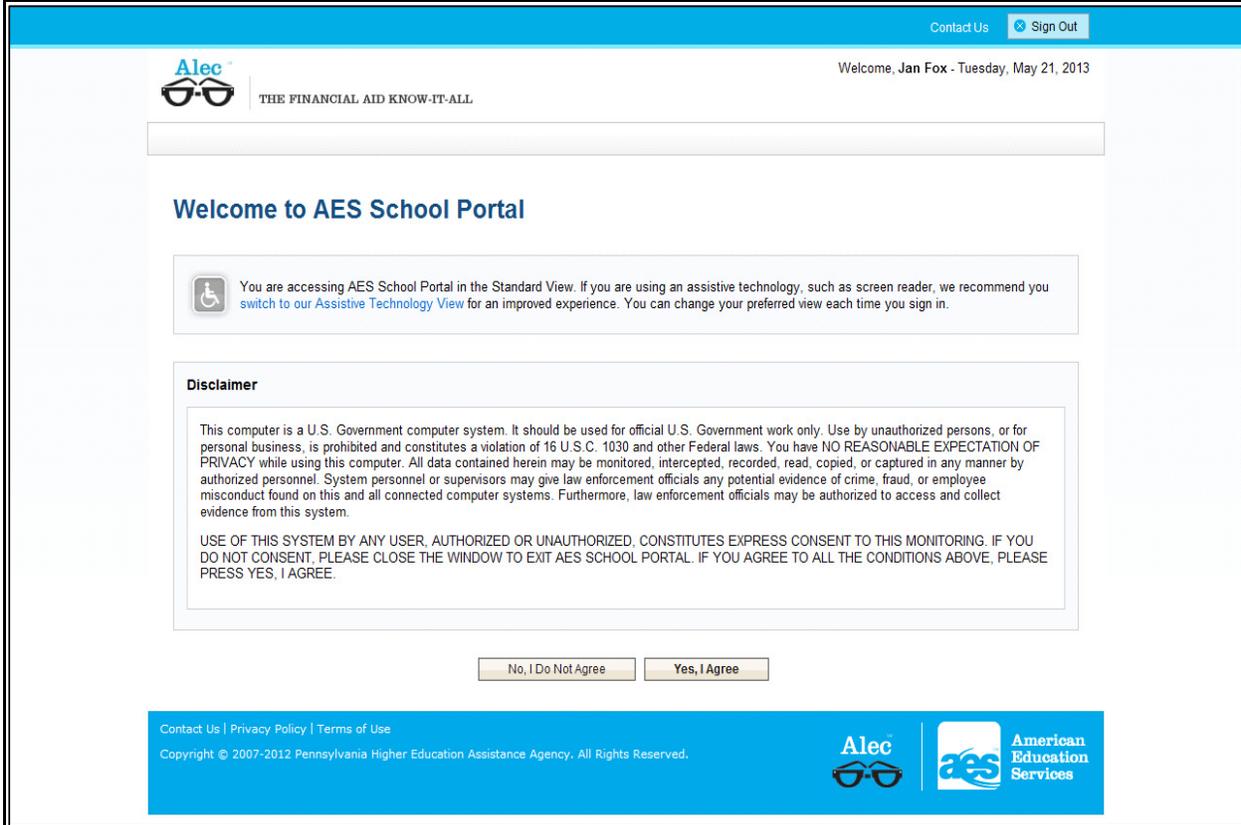
This screen does not display if the user is already logged into the Business Partner Access Management system.



1. In the **User Id** field, enter a valid RACF ID.
2. In the **Password** field, enter a valid password.
3. Click **Sign In**.

NOTE: Click **Forgot your password?** to reset the password. Click **Create an Account** to create a new user profile. See [Submitting a Request for a New User Profile](#) for step-by-step instructions.

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

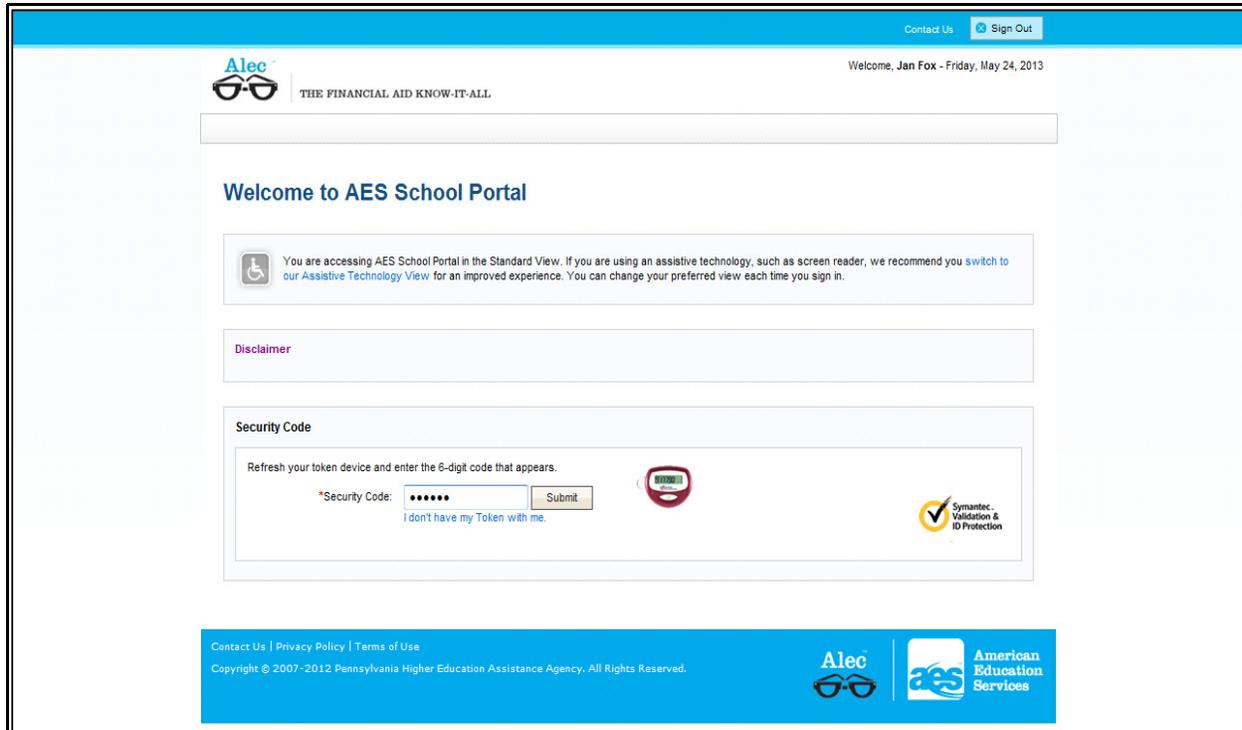


The screenshot shows the "Welcome to AES School Portal" page. At the top right, there are links for "Contact Us" and "Sign Out". The main header includes the "Alec" logo with the tagline "THE FINANCIAL AID KNOW-IT-ALL" and a welcome message for "Jan Fox" dated "Tuesday, May 21, 2013". Below the header is a search bar. The main content area features a "Welcome to AES School Portal" heading, followed by an accessibility notice with a wheelchair icon and a "Disclaimer" section. The disclaimer text states: "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." Below the disclaimer are two buttons: "No, I Do Not Agree" and "Yes, I Agree". The footer contains links for "Contact Us", "Privacy Policy", and "Terms of Use", along with copyright information for the Pennsylvania Higher Education Assistance Agency (2007-2012) and logos for "Alec" and "American Education Services".

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

4. Click **Yes, I Agree** to continue.

The **Welcome to AES School Portal** page redisplay if the user has access to federal data.



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

NOTE: Users who have a registered token but do not have it available can request a temporary security code. Click **I don't have my Token with me**. See user guide **WB0120-Web Login & Authentication for Partners_User Guide_AES** for more information.

7. Click **Submit**.

The access request is displayed.

The screenshot displays the PHEAA Business Partner Access Management System interface. The top navigation bar includes links for Home, BPAMS Tutorial, My Profile, User Profiles, Access Requests (selected), and New Profile. The main content area shows a 'Request to Change Access' for request ID CG03311, submitted by user PH12345. The request details include: Request #: 00010224, User ID: PH12345, Phone: 333-333-3333, Type: SCHOOL, Created: 11/30/2011, Submitted By: PH12345, Name: email@email.org, Email: email@email.org, Access Code: 00123400, Approved on: 11/30/2011 11:51:47, Institution: UNIVERSITY, and Approving Authority: James Smith. The status is 'Pending'. Below the details, there is a section for 'User Access Changes: Pending for ESO' with a table for 'School Reports'. The table has columns for System, Description, Action, Authoritative FLS Source, and ESO. One report is listed: 'Adding: FedLoan Servicing Default Prevention' with a yellow background. At the bottom, there are 'BACK' and 'Cancel Request' buttons.

System	Description	Action	Authoritative FLS Source	ESO
Reports	Adding: FedLoan Servicing Default Prevention		✓	✓

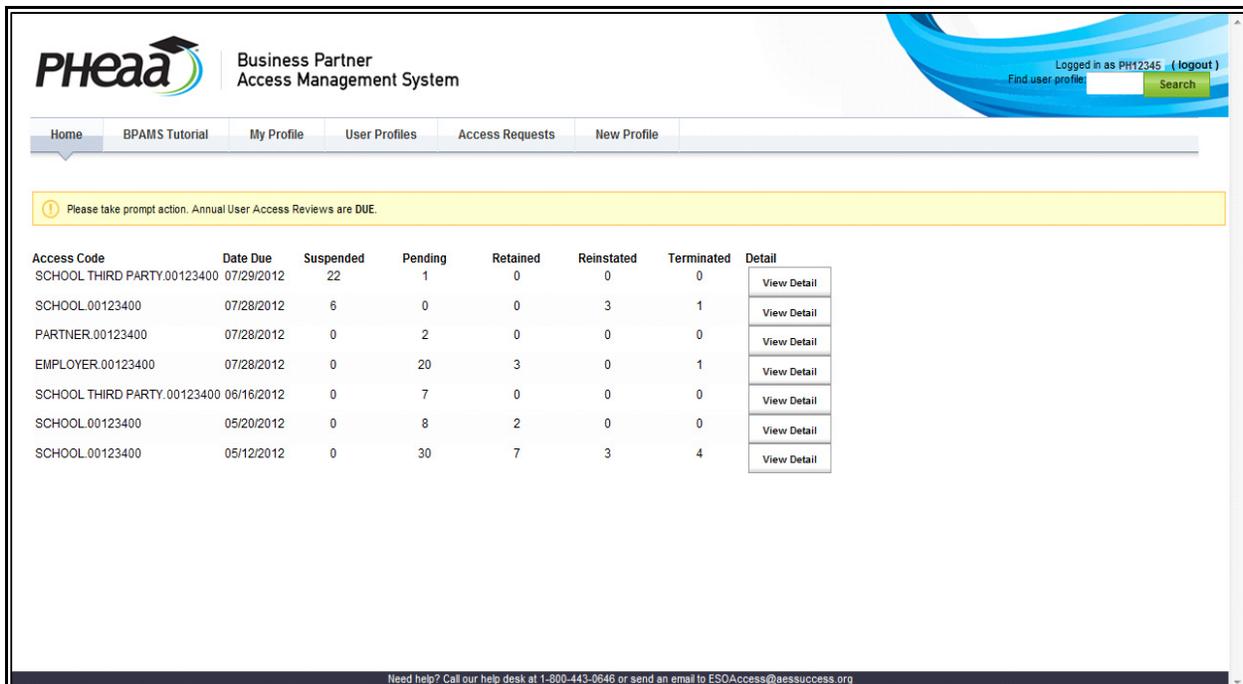
From the access request, the Authoritative Source can approve, deny or cancel pending requests. See [Approving, Denying and Canceling Pending Requests](#) for more information.

Submitting a Request for a New User Profile

Requestors who do not have a user ID can submit a request for a new user profile from the Business Partner Access Management System Login page without logging into the Business Partner Access Management System.

Users possessing a user ID can submit requests for a new user ID and profile on behalf of a user who does not have access to the Business Partner Access Management System. They can submit a request from the Business Partner Access Management System home page by logging into the Business Partner Access Management System or from the Business Partner Access Management System welcome page. The process is the same.

In this example, the user has logged into the Business Partner Access Management System and is submitting a request for a new user profile from the Business Partner Access Management System Home page.



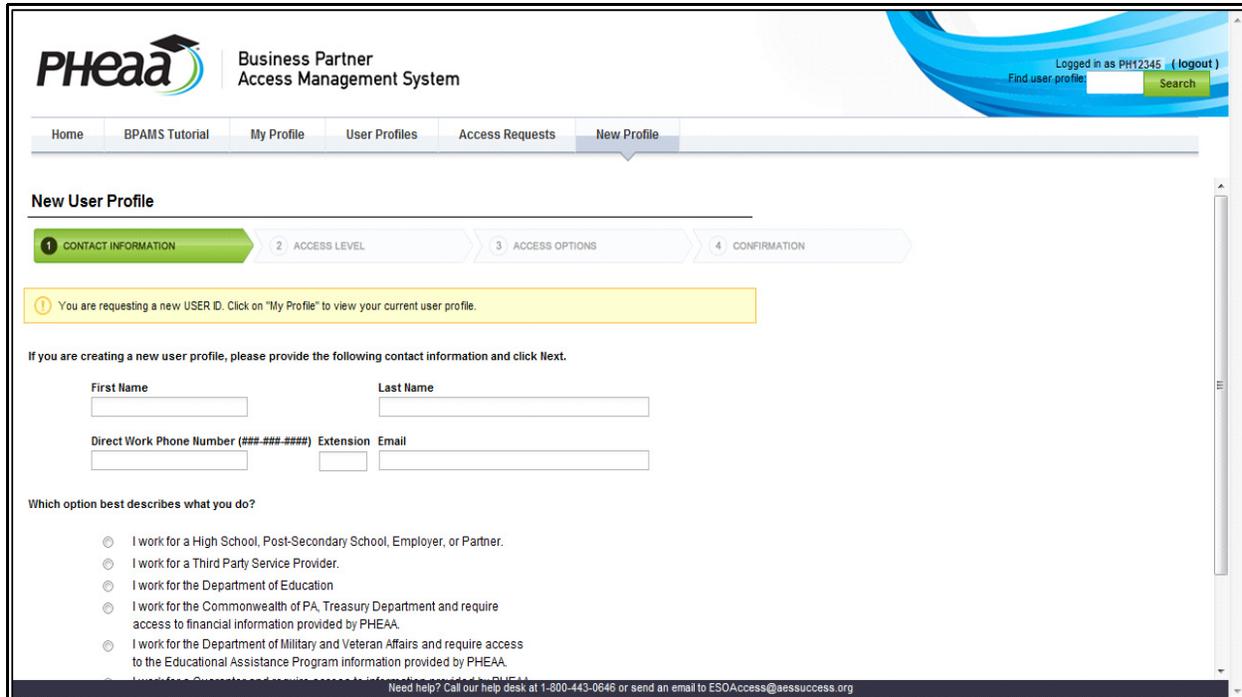
The screenshot shows the Business Partner Access Management System interface. At the top left is the PHEAA logo and the text "Business Partner Access Management System". On the top right, it says "Logged in as PH12345 - (logout)" and "Find user profile: [input] Search". Below this is a navigation menu with tabs: Home, BPAMS Tutorial, My Profile, User Profiles, Access Requests, and New Profile. A yellow warning banner reads: "Please take prompt action. Annual User Access Reviews are DUE." Below the banner is a table with the following data:

Access Code	Date Due	Suspended	Pending	Retained	Reinstated	Terminated	Detail
SCHOOL THIRD PARTY.00123400	07/29/2012	22	1	0	0	0	View Detail
SCHOOL.00123400	07/28/2012	6	0	0	3	1	View Detail
PARTNER.00123400	07/28/2012	0	2	0	0	0	View Detail
EMPLOYER.00123400	07/28/2012	0	20	3	0	1	View Detail
SCHOOL THIRD PARTY.00123400	06/16/2012	0	7	0	0	0	View Detail
SCHOOL.00123400	05/20/2012	0	8	2	0	0	View Detail
SCHOOL.00123400	05/12/2012	0	30	7	3	4	View Detail

At the bottom of the page, there is a footer: "Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org"

1. From the Business Partner Access Management System home page, click **New Profile**.

The **New User Profile – Contact Information** page displays.



PHEAA Business Partner Access Management System

Home BPAMS Tutorial My Profile User Profiles Access Requests **New Profile**

New User Profile

1 CONTACT INFORMATION 2 ACCESS LEVEL 3 ACCESS OPTIONS 4 CONFIRMATION

① You are requesting a new USER ID. Click on "My Profile" to view your current user profile.

If you are creating a new user profile, please provide the following contact information and click Next.

First Name Last Name

Direct Work Phone Number (###-###-####) Extension Email

Which option best describes what you do?

- I work for a High School, Post-Secondary School, Employer, or Partner.
- I work for a Third Party Service Provider.
- I work for the Department of Education
- I work for the Commonwealth of PA, Treasury Department and require access to financial information provided by PHEAA.
- I work for the Department of Military and Veteran Affairs and require access to the Educational Assistance Program information provided by PHEAA.

Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

2. In the **First Name** field, enter the requestor’s first name.
3. In the **Last Name** field, enter the requestor’s last name.
4. In the **Direct Work Phone Number** field, enter the requestor’s 10-digit work telephone number.
5. In the **Extension** field, enter the work telephone number extension.
6. In the **Email** field, enter the requestor’s email address.
7. Answer the following question: **Which option best describes what you do?** Select from the following options.
 - I work for a High School, Post-Secondary School, Employer, or Partner.
 - I work for a Third Party Service Provider
 - I work for the Department of Education
 - I work for the Commonwealth of PA, Treasury Department and require access to financial information provided by PHEAA.
 - I work for the Department of Military and Veteran Affairs and require access to the Educational Assistance Program Information provided by PHEAA.

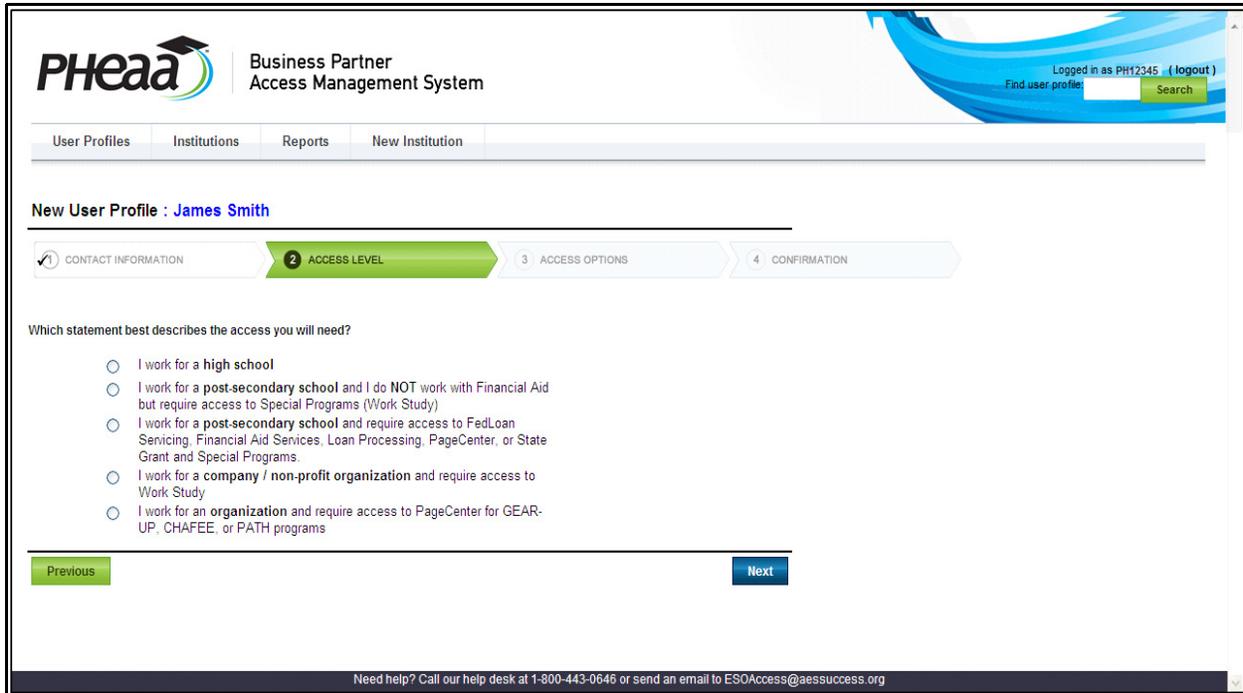
**BPAMS for Requestors, Users and the Authoritative Source**

- I work for a Guarantor and require access to information provided by PHEAA.
 - I work for a Lender and require access to information provided by PHEAA.
 - I work for a student loan servicing organization and require access to FedLoan Consolidation data.
 - I work for Health and Human Services.
8. Click **Next**, not shown.

The screen that displays next depends on the option selected in this field. Refer to the following sections for more information:

- [High School, Post-Secondary School, Employer and Partner](#)
- [Third Party Service Provider, Department of Education, Commonwealth of PA and Department of Military and Veteran Affairs](#)
- [Guarantor](#)
- [Lender](#)
- [Student Loan Servicing Organization/DL Consolidation](#)
- [Health and Human Services](#)

High School, Post-Secondary School, Employer and Partner



PHEAA Business Partner Access Management System

Logged in as PH12345 (logout)
Find user profile: Search

User Profiles | Institutions | Reports | New Institution

New User Profile : James Smith

1 CONTACT INFORMATION | 2 ACCESS LEVEL | 3 ACCESS OPTIONS | 4 CONFIRMATION

Which statement best describes the access you will need?

- I work for a high school
- I work for a post-secondary school and I do NOT work with Financial Aid but require access to Special Programs (Work Study)
- I work for a post-secondary school and require access to FedLoan Servicing, Financial Aid Services, Loan Processing, PageCenter, or State Grant and Special Programs
- I work for a company / non-profit organization and require access to Work Study
- I work for an organization and require access to PageCenter for GEAR-UP, CHAFEE, or PATH programs

Previous Next

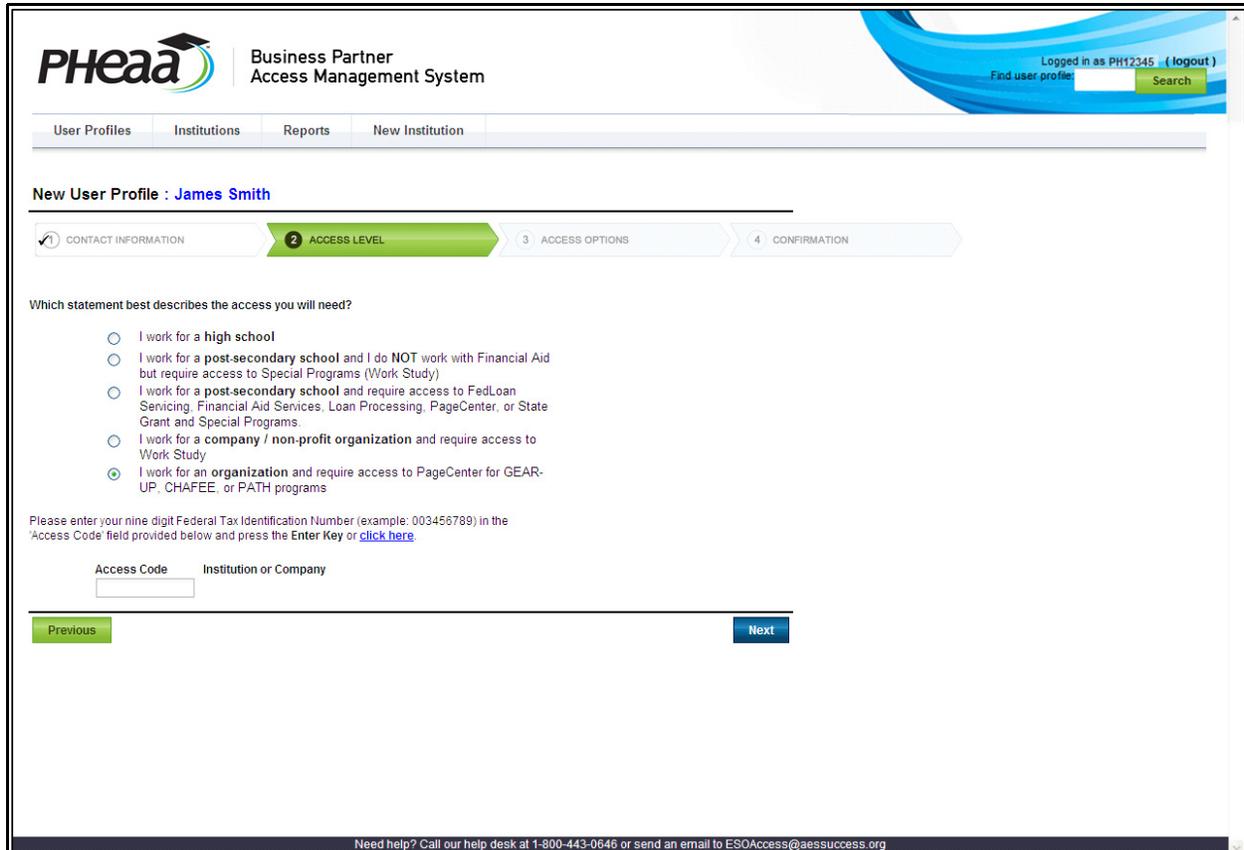
Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

The following question displays on the **New User Profile – Access Level** page if the requestor selected **I work for a High School, Post-Secondary School, Employer, or Partner**.

1. Answer the question: **Which statement best describes the access you will need?** Select from the following options.
 - I work for a high school
 - I work for a post-secondary school and I do NOT work with Financial Aid but require access to Special Programs (Work Study)
 - I work for a post-secondary school and require access to FedLoan Servicing, Financial Aid Services, Loan Processing, PageCenter, or State Grant and Special Programs
 - I work for a company / non-profit organization and require access to Work Study
 - I work for an organization and require access to PageCenter for GEAR-UP, CHAFEE, or PATH program

NOTE: I work for an organization and require access to PageCenter for GEAR-UP, CHAFEE, or PATH program is selected in this example. The following steps are the same regardless of the option selected.

The **New User Profile – Access Level** page redisplays.



PHEAA Business Partner Access Management System

Logged in as PH12345 (logout)
Find user profile: Search

User Profiles | Institutions | Reports | New Institution

New User Profile : James Smith

1 CONTACT INFORMATION | **2 ACCESS LEVEL** | 3 ACCESS OPTIONS | 4 CONFIRMATION

Which statement best describes the access you will need?

- I work for a **high school**
- I work for a **post-secondary school** and I do **NOT** work with Financial Aid but require access to Special Programs (Work Study)
- I work for a **post-secondary school** and require access to FedLoan Servicing, Financial Aid Services, Loan Processing, PageCenter, or State Grant and Special Programs.
- I work for a **company / non-profit organization** and require access to Work Study
- I work for an **organization** and require access to PageCenter for GEAR-UP, CHAFEE, or PATH programs

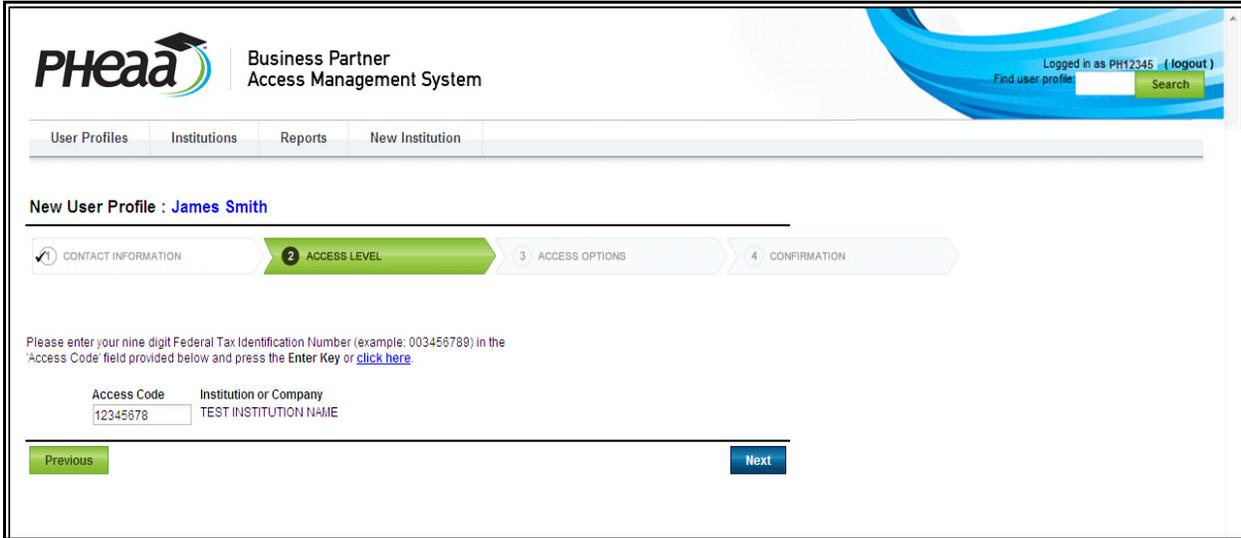
Please enter your nine digit Federal Tax Identification Number (example: 003456789) in the 'Access Code' field provided below and press the **Enter Key** or [click here](#).

Access Code Institution or Company

Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAAccess@aessuccess.org

1. In the **Access Code** field, enter the institution or company ID.
2. Press Enter to validate the access code. The school or company name displays to the right of the **Access Code** field when the institution or company ID is validated.
3. Click **Next** to go to the **New User Profile – Access Options** page.

Third Party Servicer, Department of Ed, Commonwealth of PA and Veterans Affairs

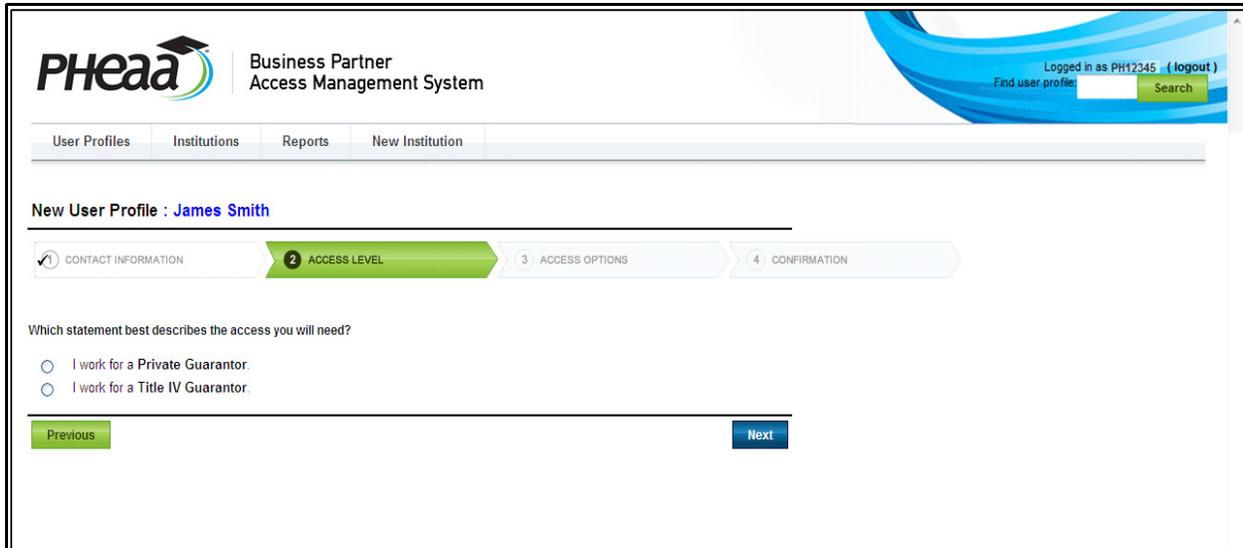


The screenshot shows the PHEAA Business Partner Access Management System interface. At the top left is the PHEAA logo. To its right, the text reads "Business Partner Access Management System". In the top right corner, it says "Logged in as PH12345 (logout)" and "Find user profile" with a search button. Below this is a navigation menu with "User Profiles", "Institutions", "Reports", and "New Institution". The main content area is titled "New User Profile : James Smith". A progress bar shows four steps: 1. CONTACT INFORMATION, 2. ACCESS LEVEL (highlighted in green), 3. ACCESS OPTIONS, and 4. CONFIRMATION. Below the progress bar, there is a text prompt: "Please enter your nine digit Federal Tax Identification Number (example: 003456789) in the 'Access Code' field provided below and press the Enter Key or [click here](#)". There are two input fields: "Access Code" with the value "12345678" and "Institution or Company" with the value "TEST INSTITUTION NAME". At the bottom, there are "Previous" and "Next" buttons.

The **Access Code** field displays on the **New User Profile – Access Level** page if the requestor selected third party service provider, Department of Education, Commonwealth of PA or Department of Military and Veteran Affairs

1. In the **Access Code** field, enter the institution or company ID.
2. Press Enter to validate the access code. The school or company name displays to the right of the **Access Code** field when the institution or company ID is validated.
3. Click **Next** to go the **New User Profile – Access Options** page.

Guarantor



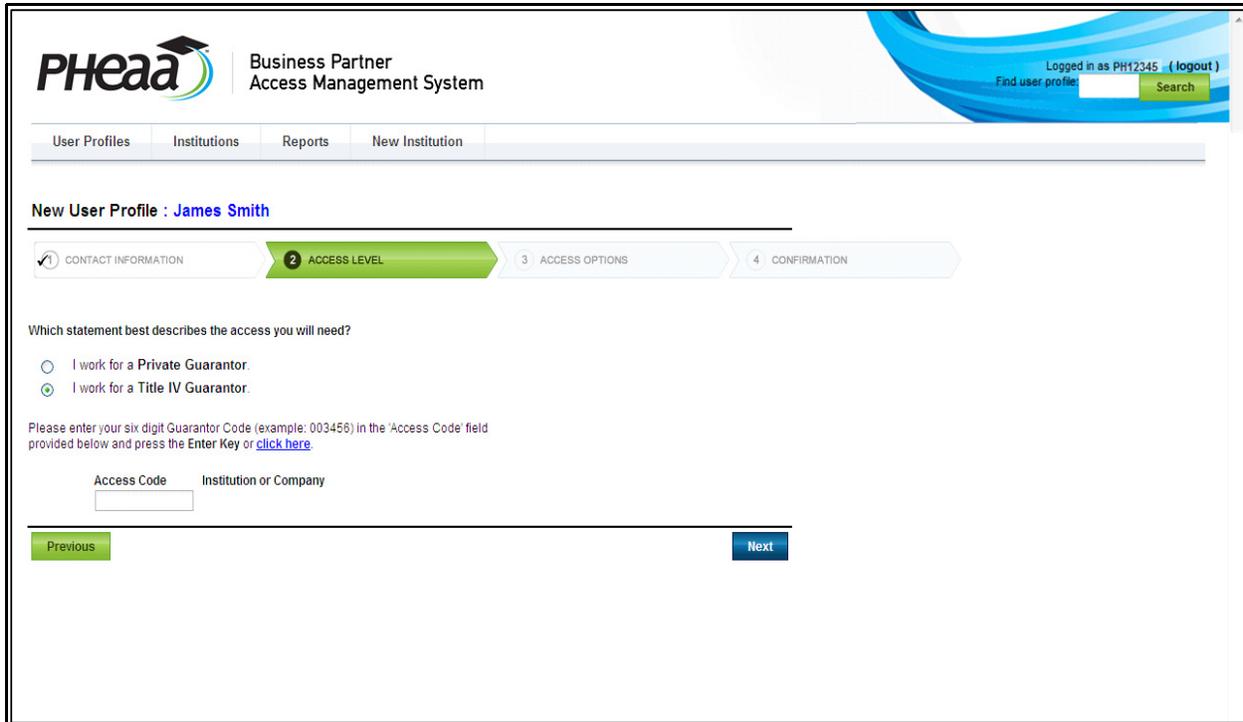
The screenshot shows the PHEAA Business Partner Access Management System interface. At the top left is the PHEAA logo and the text "Business Partner Access Management System". On the top right, it says "Logged in as PH12345 (logout)" and "Find user profile" with a search button. Below the header is a navigation menu with "User Profiles", "Institutions", "Reports", and "New Institution". The main content area shows "New User Profile : James Smith" and a progress bar with four steps: 1. CONTACT INFORMATION, 2. ACCESS LEVEL (highlighted), 3. ACCESS OPTIONS, and 4. CONFIRMATION. Below the progress bar is the question "Which statement best describes the access you will need?" with two radio button options: "I work for a Private Guarantor." and "I work for a Title IV Guarantor.". At the bottom are "Previous" and "Next" buttons.

If the requestor selected **I work for a Guarantor and require access to information provided by PHEAA**, the following question displays.

1. Answer the question: **Which statement best describes the access you will need?**
Select from the following options.
 - I work for a Private Guarantor.
 - I work for a Title IV Guarantor.

NOTE: I work for a Title IV Guarantor is selected in this example. The following steps are the same regardless of the option selected.

The **New Profile – Access Level** page redisplay.



PHEAA Business Partner Access Management System

Logged in as PH12345 (logout)
Find user profile: Search

User Profiles | Institutions | Reports | New Institution

New User Profile : James Smith

1 CONTACT INFORMATION | **2 ACCESS LEVEL** | 3 ACCESS OPTIONS | 4 CONFIRMATION

Which statement best describes the access you will need?

I work for a Private Guarantor.

I work for a Title IV Guarantor.

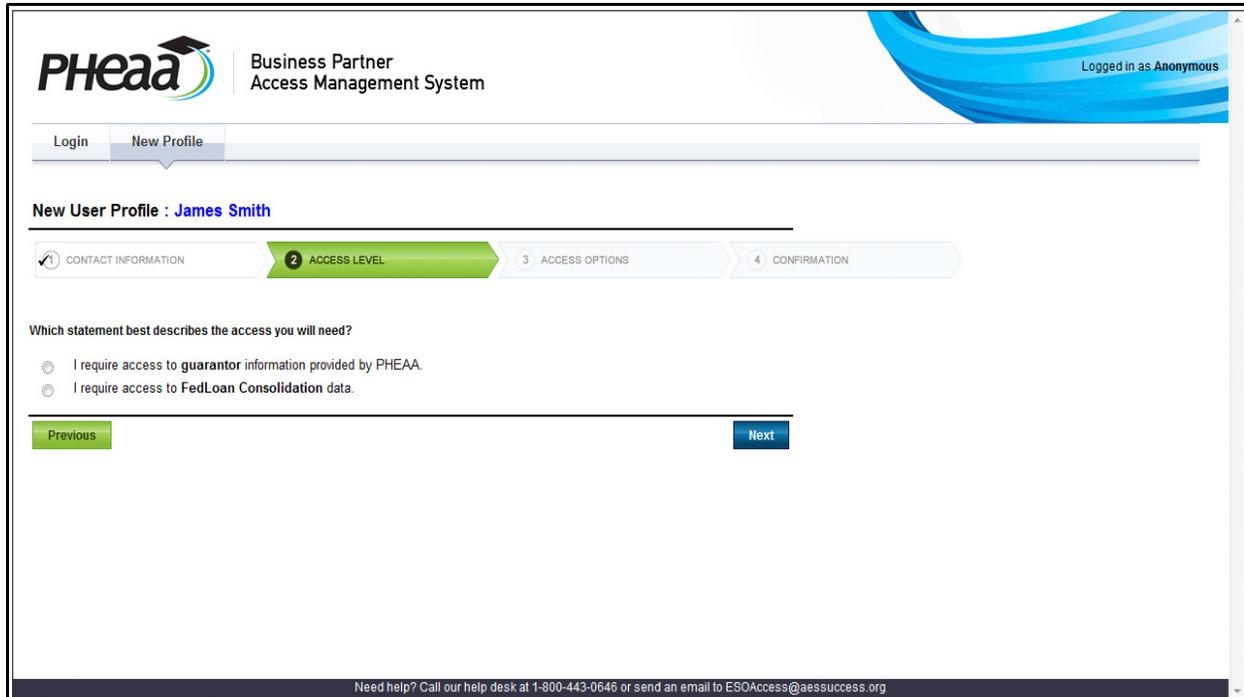
Please enter your six digit Guarantor Code (example: 003456) in the 'Access Code' field provided below and press the Enter Key or [click here](#).

Access Code Institution or Company

Previous

2. In the **Access Code** field, enter the institution or company ID.
3. Press Enter to validate the access code. The school or company name displays to the right of the **Access Code** field when the institution or company ID is validated.
4. Click **Next** to go to the **New User Profile – Access Options** page.

Lender



PHEAA Business Partner Access Management System

Logged in as Anonymous

Login New Profile

New User Profile : James Smith

1 CONTACT INFORMATION 2 ACCESS LEVEL 3 ACCESS OPTIONS 4 CONFIRMATION

Which statement best describes the access you will need?

I require access to guarantor information provided by PHEAA.

I require access to FedLoan Consolidation data.

Previous Next

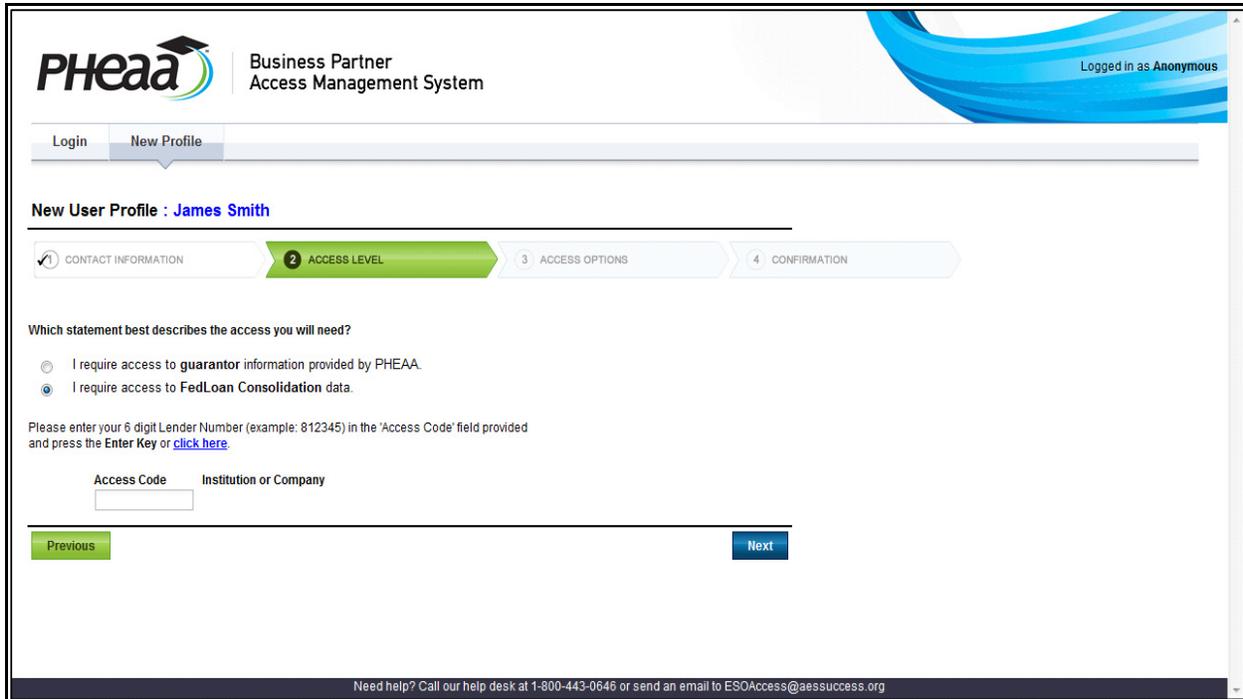
Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

If the requestor selected **I work for a Lender and require access to information provided by PHEAA**, the following question displays.

1. Answer the question: **Which statement best describes the access you will need?**
Select from the following options.
 - I require access to guarantor information provided by PHEAA.
 - I require access to FedLoan Consolidation data.

NOTE: **I require access to FedLoan Consolidation data** is selected in this example. The following steps are the same regardless of the option selected.

The **New Profile – Access Level** page redispays.



PHEAA Business Partner Access Management System

Logged in as **Anonymous**

Login New Profile

New User Profile : **James Smith**

1 CONTACT INFORMATION 2 ACCESS LEVEL 3 ACCESS OPTIONS 4 CONFIRMATION

Which statement best describes the access you will need?

I require access to **guarantor** information provided by PHEAA.

I require access to FedLoan Consolidation data.

Please enter your 6 digit Lender Number (example: 812345) in the 'Access Code' field provided and press the Enter Key or [click here](#).

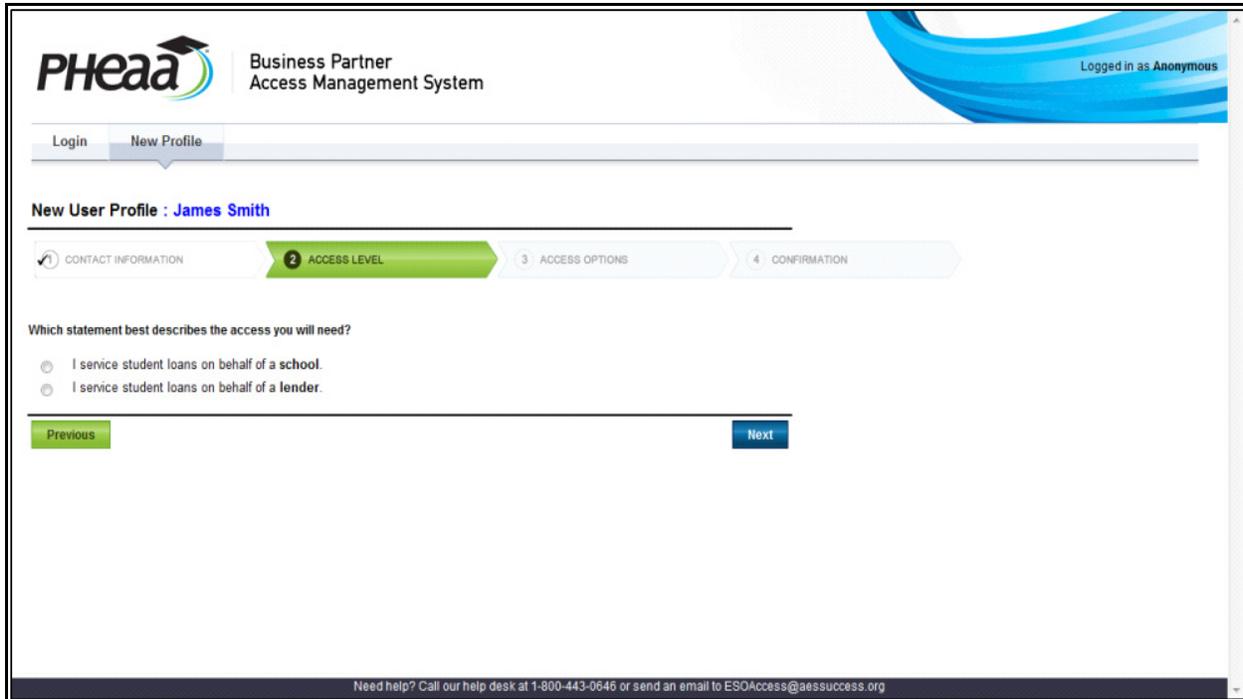
Access Code Institution or Company

Previous Next

Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

2. In the **Access Code** field, enter the institution or company ID.
3. Press Enter to validate the access code. The school or company name displays to the right of the **Access Code** field when the institution or company ID is validated.
4. Click **Next** to go to the **New User Profile – Access Options** page.

Student Loan Servicer for Direct Loan Consolidation



PHEAA Business Partner Access Management System

Logged in as Anonymous

Login New Profile

New User Profile : James Smith

1 CONTACT INFORMATION 2 ACCESS LEVEL 3 ACCESS OPTIONS 4 CONFIRMATION

Which statement best describes the access you will need?

I service student loans on behalf of a school.

I service student loans on behalf of a lender.

Previous Next

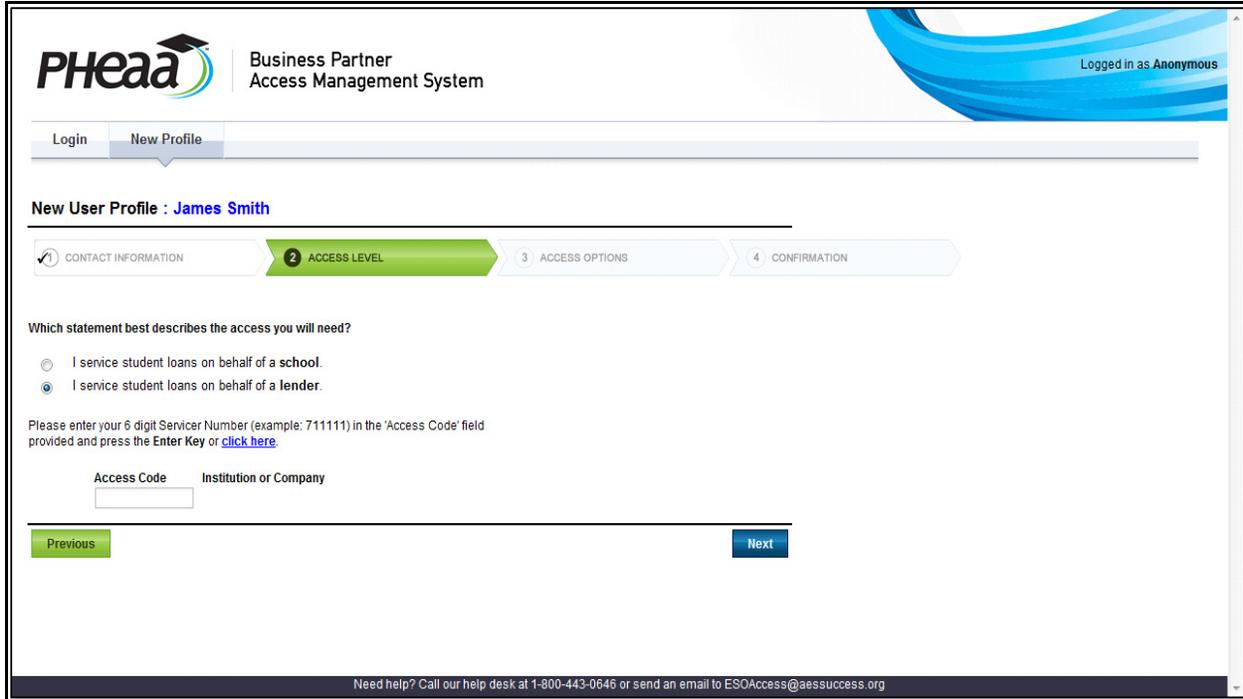
Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

If the requestor selected **I work for a student loan servicing organization and I require access to FedLoan Consolidation data**, the following question displays.

1. Answer the question: **Which statement best describes the access you will need?**
Select from the following options.
 - I service student loans on behalf of a school.
 - I service student loans on behalf of a lender.

NOTE: **I service student loans on behalf of a lender** is selected in this example. The following steps are the same regardless of the option selected.

The **New Profile – Access Level** page redispays.



PHEAA Business Partner Access Management System

Logged in as **Anonymous**

Login **New Profile**

New User Profile : **James Smith**

1 CONTACT INFORMATION **2 ACCESS LEVEL** 3 ACCESS OPTIONS 4 CONFIRMATION

Which statement best describes the access you will need?

I service student loans on behalf of a school.

I service student loans on behalf of a lender.

Please enter your 6 digit Servicer Number (example: 711111) in the 'Access Code' field provided and press the Enter Key or [click here](#).

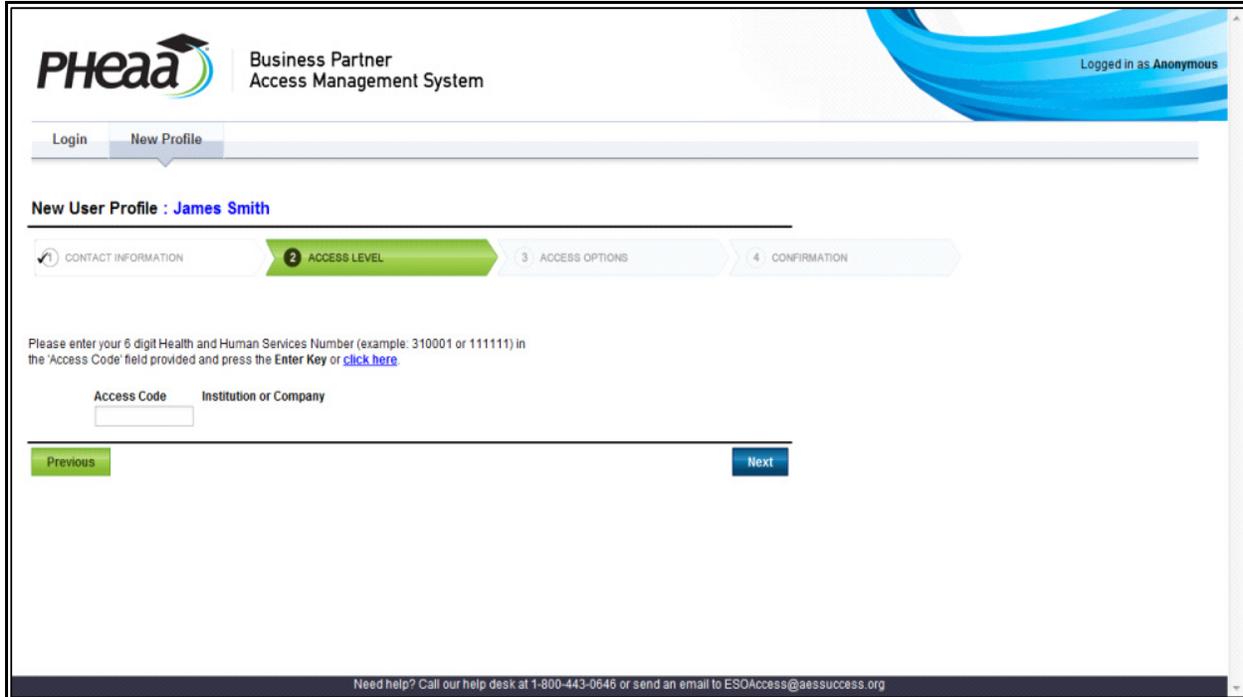
Access Code Institution or Company

Previous Next

Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

2. In the **Access Code** field, enter the institution or company ID.
3. Press Enter to validate the access code. The school or company name displays to the right of the **Access Code** field when the institution or company ID is validated.
4. Click **Next** to go to the **New User Profile – Access Options** page.

Health and Human Services



PHEAA Business Partner Access Management System

Logged in as **Anonymous**

Login New Profile

New User Profile : **James Smith**

1 CONTACT INFORMATION 2 ACCESS LEVEL 3 ACCESS OPTIONS 4 CONFIRMATION

Please enter your 6 digit Health and Human Services Number (example: 310001 or 111111) in the 'Access Code' field provided and press the Enter Key or [click here](#)

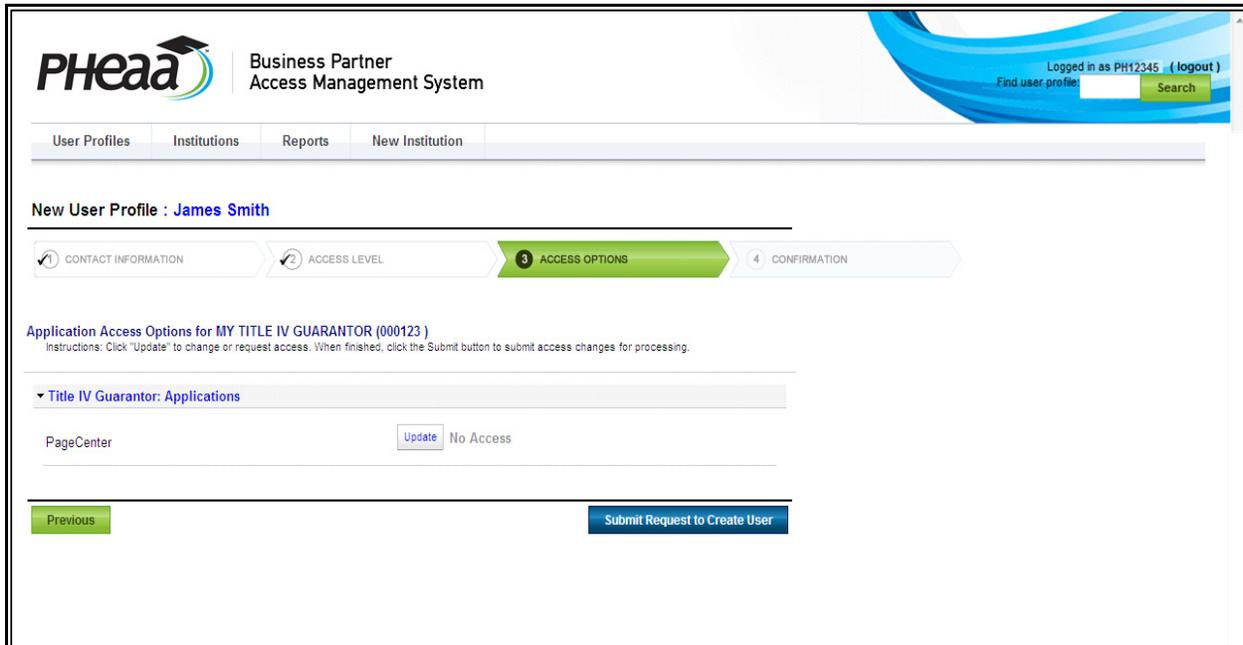
Access Code Institution or Company

Previous Next

Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

1. In the **Access Code** field, enter the institution or company ID.
2. Press Enter to validate the access code. The school or company name displays to the right of the **Access Code** field when the institution or company ID is validated.
3. Click **Next** to go to the **New User Profile – Access Options** page.

The **New User Profile – Access Options** page displays after all access level selections have been made.

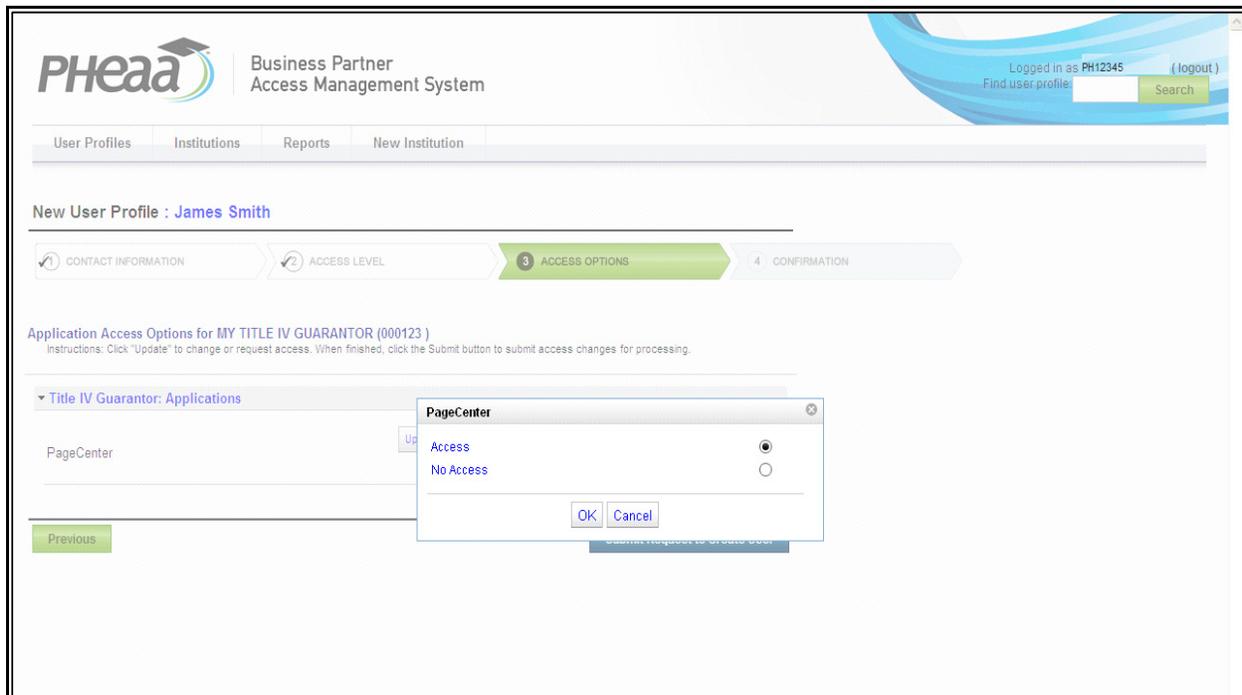


The screenshot shows the PHEAA Business Partner Access Management System interface. At the top left is the PHEAA logo and the text "Business Partner Access Management System". At the top right, it says "Logged in as PH12345 (logout)" and "Find user profile" with a search button. Below this is a navigation menu with "User Profiles", "Institutions", "Reports", and "New Institution". The main content area is titled "New User Profile : James Smith". A progress bar shows four steps: 1. CONTACT INFORMATION, 2. ACCESS LEVEL, 3. ACCESS OPTIONS (highlighted in green), and 4. CONFIRMATION. Below the progress bar, it says "Application Access Options for MY TITLE IV GUARANTOR (000123)" and provides instructions: "Instructions: Click 'Update' to change or request access. When finished, click the Submit button to submit access changes for processing." There is a dropdown menu for "Title IV Guarantor: Applications" which is currently expanded to show "PageCenter" with an "Update" button and "No Access" status. At the bottom, there are "Previous" and "Submit Request to Create User" buttons.

The **New User Profile – Access Options** page displays a list of resources for which the requestor can submit a request. The requestor's current access displays to the right of each resource. When a request for a new user profile is submitted, the user has no access.

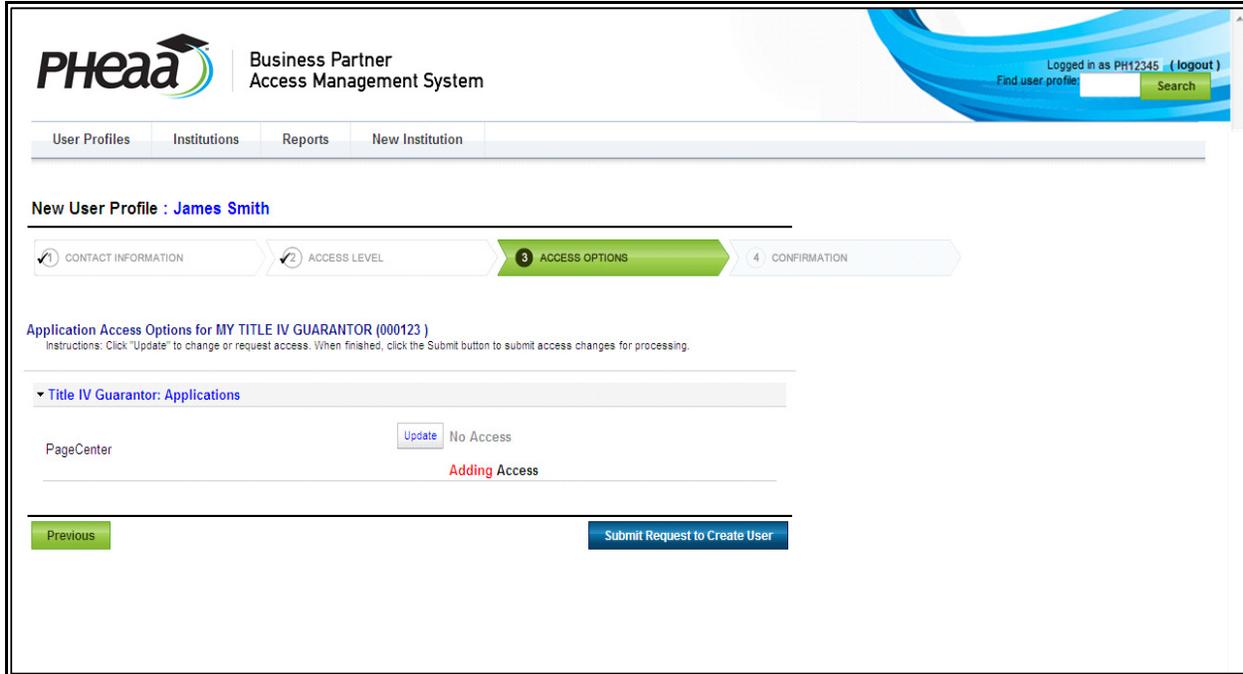
1. To select access, click **Update** to the right of the resource.

A dialog box displays with the access options for the selected resource. The access options that display depend on the resource selected.



2. Select an access option and click **OK**. Click **Cancel** to return to the **New User Profile – Access Options** page without making a selection.

The **New User Profile – Access Options** page redisplay.



The screenshot shows the PHEAA Business Partner Access Management System interface. At the top left is the PHEAA logo and the text "Business Partner Access Management System". On the top right, it says "Logged in as PH12345 (logout)" and "Find user profile: [input] Search". Below this is a navigation bar with "User Profiles", "Institutions", "Reports", and "New Institution". The main heading is "New User Profile : James Smith". A progress bar shows four steps: 1. CONTACT INFORMATION, 2. ACCESS LEVEL, 3. ACCESS OPTIONS (highlighted in green), and 4. CONFIRMATION. Below the progress bar, the text reads "Application Access Options for MY TITLE IV GUARANTOR (000123)" with instructions: "Instructions: Click 'Update' to change or request access. When finished, click the Submit button to submit access changes for processing." A dropdown menu is open for "Title IV Guarantor: Applications", showing a table with one row: "PageCenter" with an "Update" button and "No Access" text. Below the table, it says "Adding Access". At the bottom left is a "Previous" button, and at the bottom right is a "Submit Request to Create User" button.

A message displays below the resource indicating that the access option has been changed.

3. To submit the request for a new user profile and access, click **Submit Request to Create User**.

The **Verification** dialog box displays.

The screenshot shows the BPAMS Business Partner Access Management System interface. The user is logged in as PH12345. The main navigation bar includes User Profiles, Institutions, Reports, and New Institution. The current page is titled "New User Profile : James Smith" and shows a progress bar with four steps: 1. CONTACT INFORMATION, 2. ACCESS LEVEL, 3. ACCESS OPTIONS (highlighted), and 4. CONFIRMATION. The "Application Access Options for MY TITLE IV GUARANTOR" section is visible, with a "Title IV Guarantor: Applications" dropdown menu. A "PageCenter" application is listed. A "Verification" dialog box is open, displaying the following information:

Verification

Please review your changes before proceeding.

Last Name	SMITH
Phone	7175555555
Extension	5555
Email	email@email.com
User Type	TIVGUAR
Company	MY TITLE IV GUARANTOR
Access Code	000123

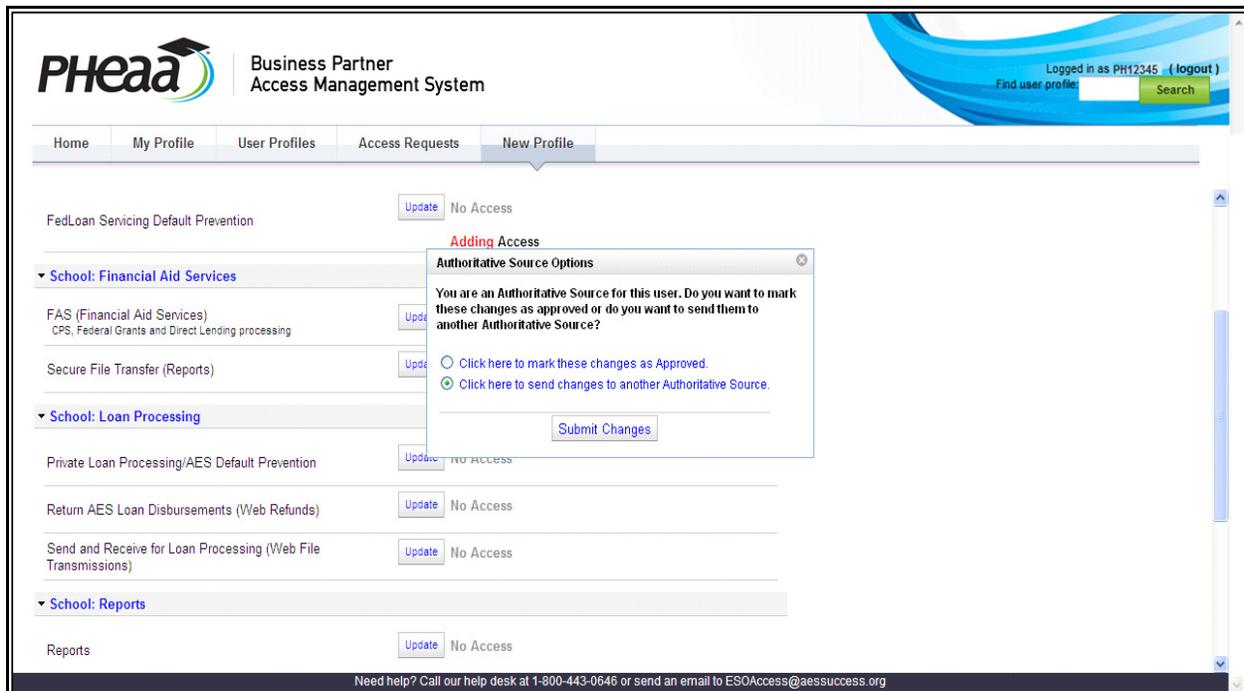
✓ Adding Access to PageCenter

Comments:

Return to Form Submit Changes

4. In the **Comments** field, enter a comment. *This field is optional.*
5. Click **Submit Changes** to submit the changes or click **Return to Form** to return to the **Application Access Options** page without submitting the changes.

The **Authoritative Source Options** dialog box displays if the request for a new user profile is submitted by an authoritative source.



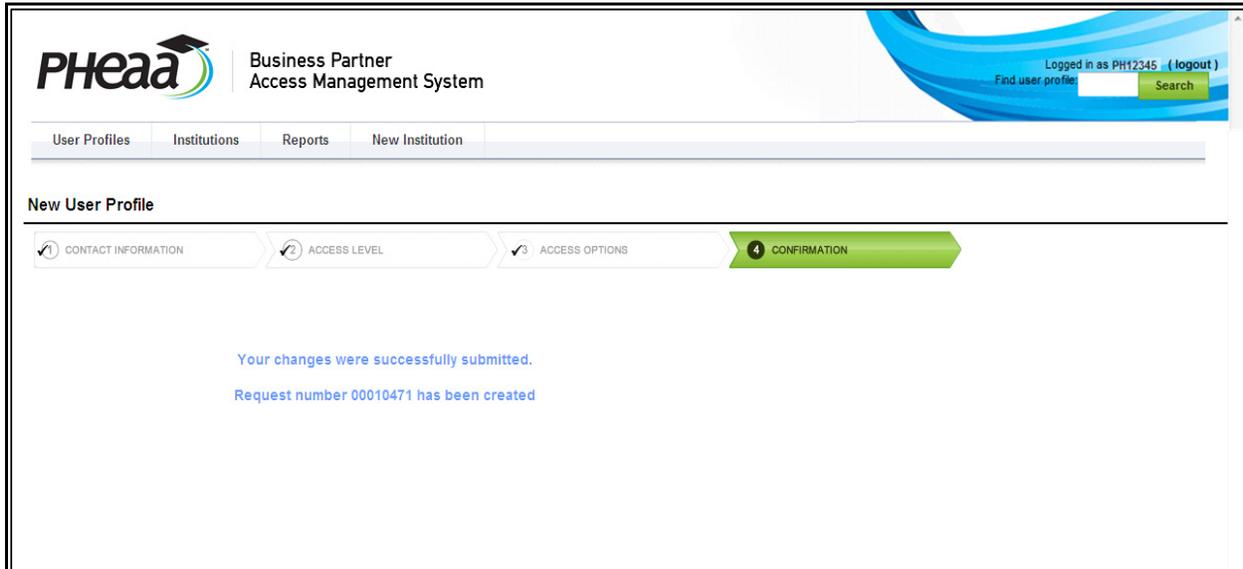
6. Select one of the following options. Click the radio button to make a selection.

- **Click here to mark these changes as Approved.**
- **Click here to send changes to another Authoritative Source.**

7. Click **Submit Changes**.

The following message displays on the **New User Profile – Confirmation** page:

Your changes were successfully submitted. Request Number XXXXXXXX has been created.



The screenshot shows the PHEAA Business Partner Access Management System interface. The top navigation bar includes 'User Profiles', 'Institutions', 'Reports', and 'New Institution'. The user is logged in as PH12345. The main content area is titled 'New User Profile' and features a progress bar with four steps: 1. CONTACT INFORMATION, 2. ACCESS LEVEL, 3. ACCESS OPTIONS, and 4. CONFIRMATION. The 'CONFIRMATION' step is highlighted in green. Below the progress bar, a blue message states: 'Your changes were successfully submitted. Request number 00010471 has been created.'

When a request for a user ID and profile is submitted, a notification email is sent to the user's Authoritative Source notifying them that an access request is pending.

Once the request is approved by the Authoritative Source—or if it was submitted by the Authoritative Source and approved—it is sent to the Business Unit Approver for final approval before it is completed by the Enterprise Security Office.

Searching for User Profiles and Open Access Requests

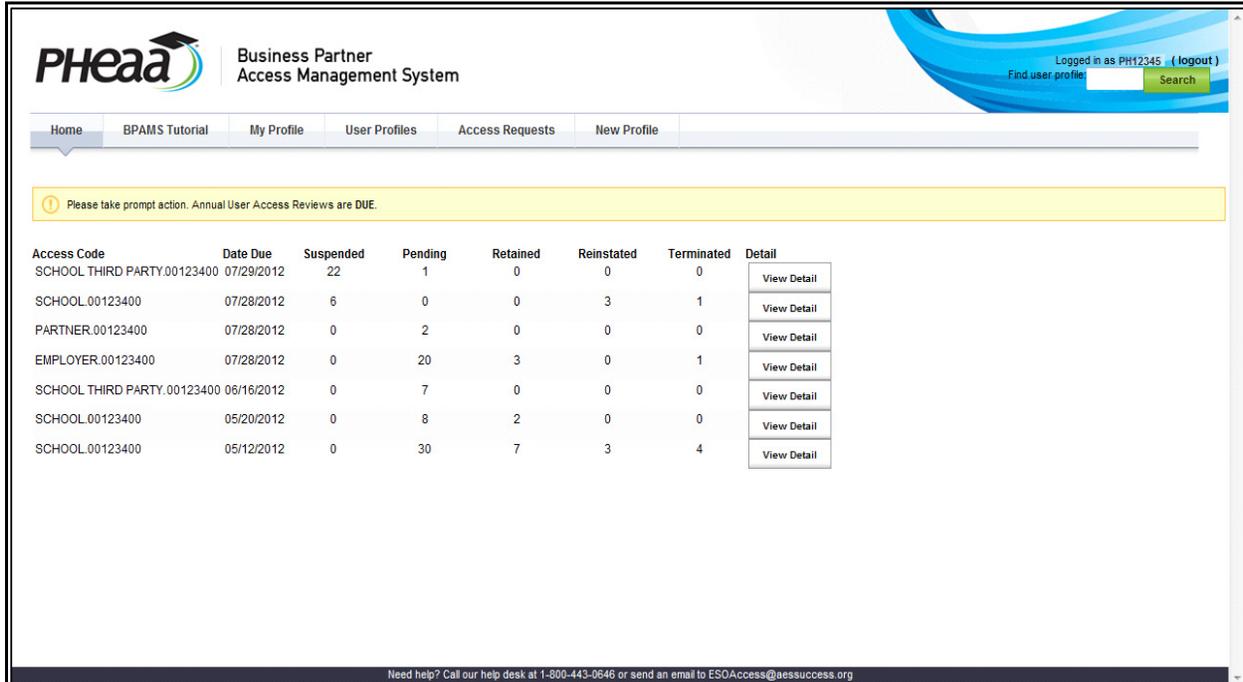
The Authoritative Source can search for user profiles and open access requests from the User Profiles page, and the Access Requests page. Users can search for open access requests only. All options are explained.

To search for user profiles on the User Profiles page, see [Searching for User Profiles on the User Profiles Page](#) for more information.

To search for access requests on the Access Requests page, see [Searching for Access Requests on the Access Requests Page](#) for more information.

Searching for User Profiles on the User Profiles Page

Follow the steps below to search for user profiles on the **User Profile** page.



Business Partner Access Management System

Logged in as PH12345 (logout)
Find user profile: Search

Home | BPAMS Tutorial | My Profile | **User Profiles** | Access Requests | New Profile

ⓘ Please take prompt action. Annual User Access Reviews are DUE.

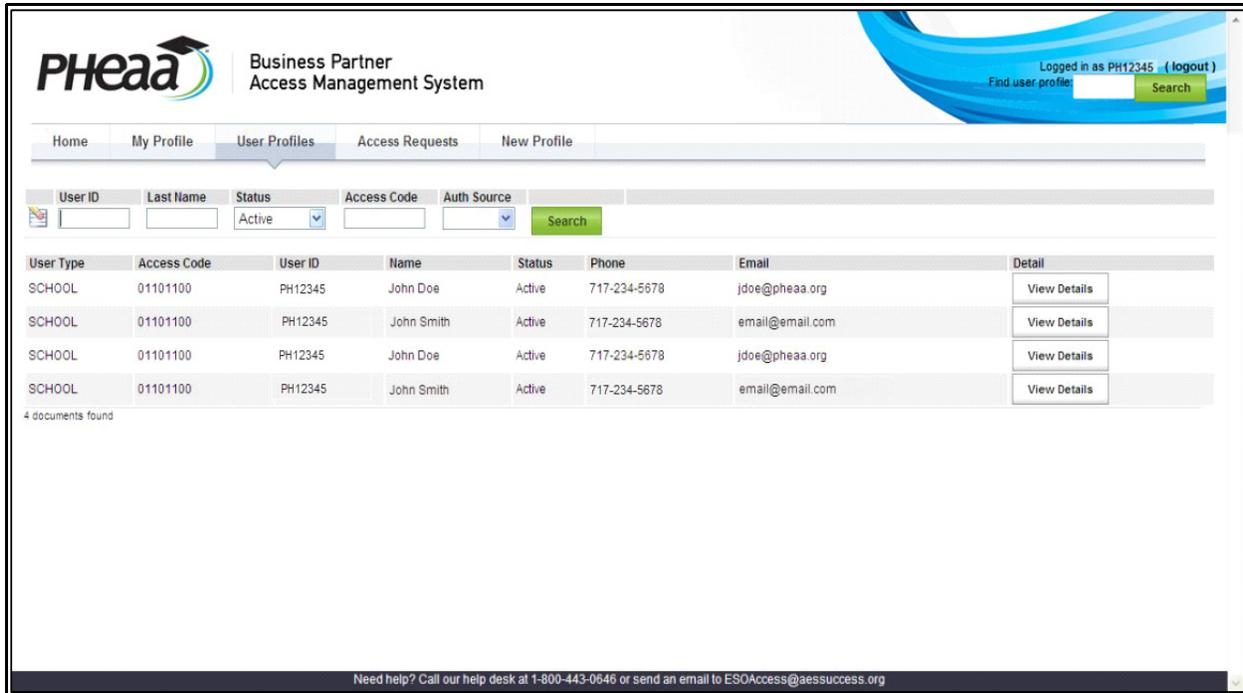
Access Code	Date Due	Suspended	Pending	Retained	Reinstated	Terminated	Detail
SCHOOL THIRD PARTY.00123400	07/29/2012	22	1	0	0	0	View Detail
SCHOOL.00123400	07/28/2012	6	0	0	3	1	View Detail
PARTNER.00123400	07/28/2012	0	2	0	0	0	View Detail
EMPLOYER.00123400	07/28/2012	0	20	3	0	1	View Detail
SCHOOL THIRD PARTY.00123400	06/16/2012	0	7	0	0	0	View Detail
SCHOOL.00123400	05/20/2012	0	8	2	0	0	View Detail
SCHOOL.00123400	05/12/2012	0	30	7	3	4	View Detail

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- To search for a user profile on the **User Profiles** page, click **User Profiles** on navigation menu.

NOTE: The Authoritative Source may search for a user profile from any screen in the Business Partner Access Management System by entering the user ID in the **Find user profile** field, located in the top-right corner of the screen, and clicking **Search**.

The **User Profiles** search page displays.

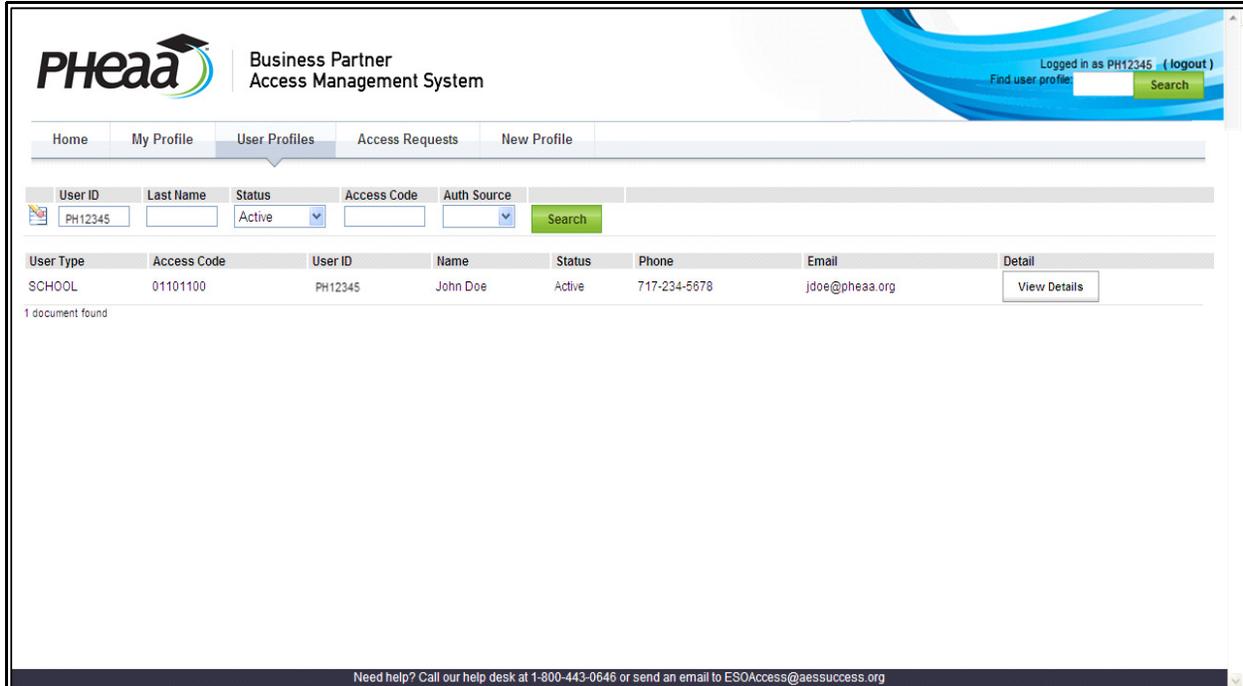


Use the search options at the top of the screen to search for a user profile. Define as many criteria as possible to narrow the list of search results but be careful to select non-conflicting criteria; otherwise, an error may occur and no results will be returned. At least one field is required.

2. In the **User ID** field, enter the ID of the user, if known.
3. In the **Last Name** field, enter the user’s last name.
4. Click the down arrow in the **Status** field and select the status of the user profile.
5. In the **Access Code**, enter the access code assigned to the user’s institution.
6. Click the down arrow in the **Auth Source** field and select **Yes** to indicate that the user is an Authoritative Source. Leave this field blank if the user is not an Authoritative Source.
7. Click **Search** to return a list of user profiles that match the entered search criteria.

NOTE: Click the eraser icon to the left of the **User ID** field to clear the search results and begin a new search.

The **User Profiles** search page redisplay a list of user profiles that match the search criteria.



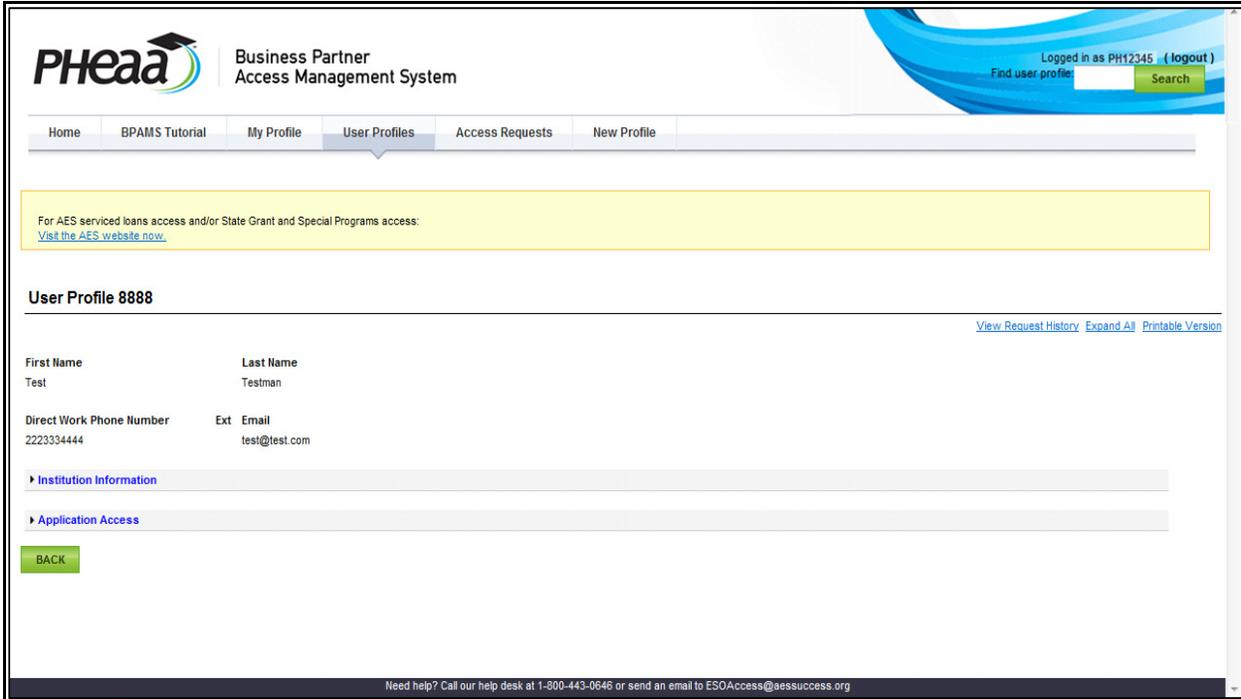
The screenshot shows the 'Business Partner Access Management System' interface. At the top left is the PHEAA logo. The page title is 'Business Partner Access Management System'. In the top right corner, it says 'Logged in as PH12345 (logout)' and 'Find user profile: [input field] Search'. Below this is a navigation menu with 'Home', 'My Profile', 'User Profiles' (selected), 'Access Requests', and 'New Profile'. A search form is present with fields for 'User ID' (containing 'PH12345'), 'Last Name', 'Status' (set to 'Active'), 'Access Code', and 'Auth Source', followed by a 'Search' button. Below the search form is a table with the following data:

User Type	Access Code	User ID	Name	Status	Phone	Email	Detail
SCHOOL	01101100	PH12345	John Doe	Active	717-234-5878	jdoe@pheaa.org	View Details

Below the table, it says '1 document found'. At the bottom of the page, there is a footer: 'Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org'.

8. Click **View Details** to open the user profile.

The **User Profile** page displays.



The screenshot shows the PHEAA Business Partner Access Management System interface. At the top left is the PHEAA logo. To its right, the text reads "Business Partner Access Management System". In the top right corner, it says "Logged in as PH12345 (logout)" and includes a search box for "Find user profile" with a "Search" button. Below this is a navigation menu with tabs for "Home", "BPAMS Tutorial", "My Profile", "User Profiles" (which is selected), "Access Requests", and "New Profile". A yellow banner below the menu contains the text: "For AES serviced loans access and/or State Grant and Special Programs access: [Visit the AES website now.](#)". The main content area is titled "User Profile 8888" and includes links for "View Request History", "Expand All", and "Printable Version". The profile information is displayed in a table:

First Name	Last Name
Test	Testman

Direct Work Phone Number	Ext	Email
2223334444		test@test.com

Below the table are two expandable sections: "Institution Information" and "Application Access". At the bottom left of the profile area is a green "BACK" button. At the very bottom of the page, a footer reads: "Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAAccess@aessuccess.org".

From the **User Profile** screen, users and the Authoritative Source can view and change the user profile information and access privileges or terminate the user profile.

To view or change a user profile, see [Viewing User Profiles and Access Privileges](#) for more information.

To terminate user profiles, see [Submitting a Request to Terminate a User Profile](#) or more information.

Searching for Access Requests on the Access Requests Page

Follow the steps below to search for open access requests on the **Access Requests** page.

PHEAA Business Partner Access Management System

Logged in as PH12345 (logout)
Find user profile: Search

Home | BPAMS Tutorial | My Profile | User Profiles | **Access Requests** | New Profile

ⓘ Please take prompt action. Annual User Access Reviews are DUE.

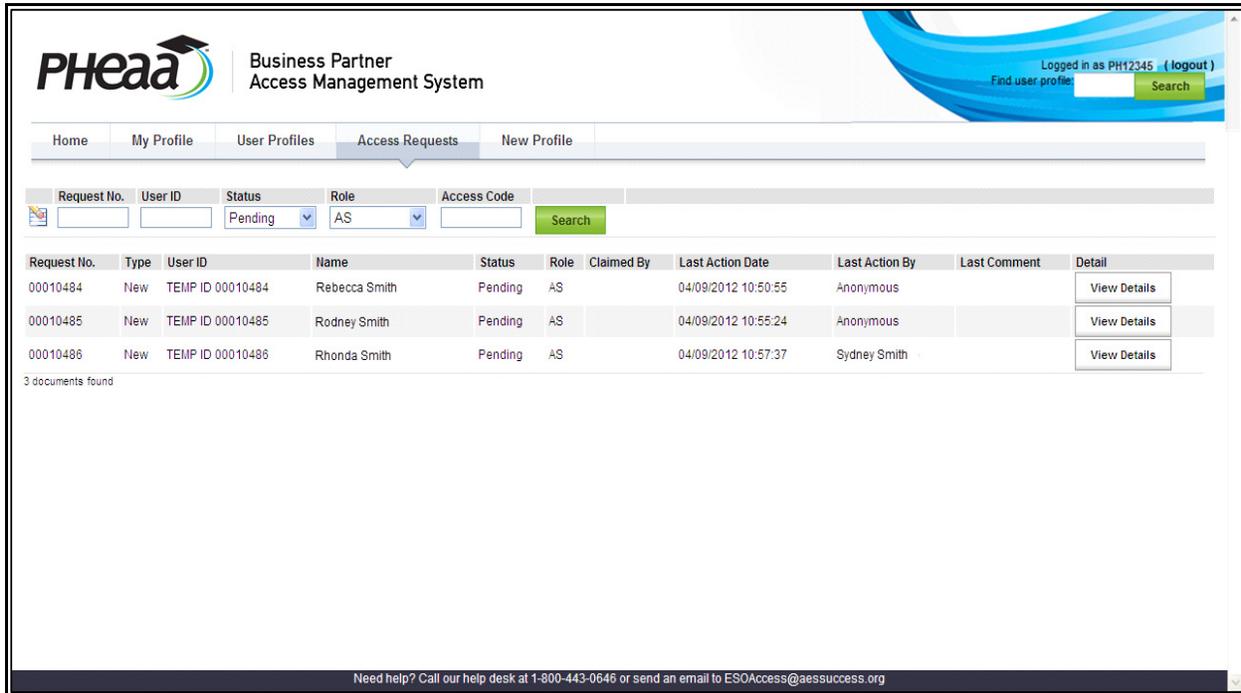
Access Code	Date Due	Suspended	Pending	Retained	Reinstated	Terminated	Detail
SCHOOL THIRD PARTY.00123400	07/29/2012	22	1	0	0	0	View Detail
SCHOOL.00123400	07/28/2012	6	0	0	3	1	View Detail
PARTNER.00123400	07/28/2012	0	2	0	0	0	View Detail
EMPLOYER.00123400	07/28/2012	0	20	3	0	1	View Detail
SCHOOL THIRD PARTY.00123400	06/16/2012	0	7	0	0	0	View Detail
SCHOOL.00123400	05/20/2012	0	8	2	0	0	View Detail
SCHOOL.00123400	05/12/2012	0	30	7	3	4	View Detail

Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

1. To search for an open access request on the **Access Requests** page, click **Access Requests** the navigation menu.

The **Access Requests** search page displays.

Use the search options at the top of the screen to search for an access request. Define as many criteria as possible to narrow the list of search results but be careful to select non-conflicting criteria; otherwise, an error may occur and no results will be returned. At least one field is required.



Business Partner Access Management System

Logged in as PH12345 (Logout)
Find user profile: Search

Home My Profile User Profiles **Access Requests** New Profile

Request No. User ID Status Role Access Code Search

Request No.	Type	User ID	Name	Status	Role	Claimed By	Last Action Date	Last Action By	Last Comment	Detail
00010484	New	TEMP ID 00010484	Rebecca Smith	Pending	AS		04/09/2012 10:50:55	Anonymous		View Details
00010485	New	TEMP ID 00010485	Rodney Smith	Pending	AS		04/09/2012 10:55:24	Anonymous		View Details
00010486	New	TEMP ID 00010486	Rhonda Smith	Pending	AS		04/09/2012 10:57:37	Sydney Smith		View Details

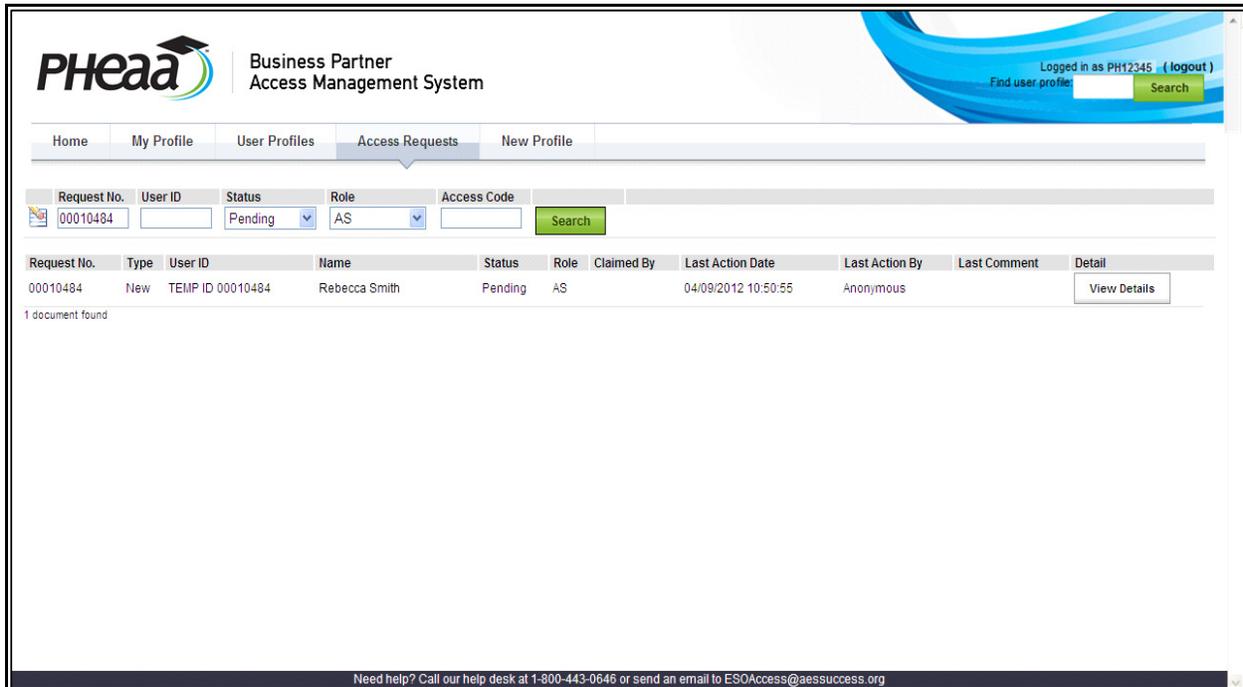
3 documents found

Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

2. In the **Request No.** field, enter the number of the access request, if known.
3. In the **User ID** field, enter the ID of the user, if known.
4. Click the down arrow in the **Status** field and select the status of the access request.
5. Click the down arrow in the **Role** field and select the role of the user for which the access request is pending action.
6. In the **Access Code**, enter the access code assigned to the requestor's institution.
7. Click **Search** to return a list of access requests that match the entered search criteria.

NOTE: Click the eraser icon to the left of the **Request No.** field to clear the search results and begin a new search.

The **Access Requests** search page redisplay a list of access requests that match the search criteria.



The screenshot shows the 'Business Partner Access Management System' interface. At the top, there is a navigation bar with tabs for 'Home', 'My Profile', 'User Profiles', 'Access Requests', and 'New Profile'. The 'Access Requests' tab is selected. Below the navigation bar, there is a search form with the following fields: 'Request No.' (containing '00010484'), 'User ID' (empty), 'Status' (dropdown menu set to 'Pending'), 'Role' (dropdown menu set to 'AS'), and 'Access Code' (empty). A green 'Search' button is located to the right of the 'Access Code' field. Below the search form, there is a table with the following columns: 'Request No.', 'Type', 'User ID', 'Name', 'Status', 'Role', 'Claimed By', 'Last Action Date', 'Last Action By', 'Last Comment', and 'Detail'. The table contains one row of data: '00010484', 'New', 'TEMP ID 00010484', 'Rebecca Smith', 'Pending', 'AS', '04/09/2012 10:50:55', 'Anonymous', and a 'View Details' button. Below the table, it says '1 document found'. At the bottom of the page, there is a footer with the text: 'Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org'.

1. Click **View Details** to open the access request.

The **Access Request** page displays.

From the **Access Request** screen, the Authoritative Source can approve, deny or cancel the access request or terminate the user profile.

Request to Change Access:

CG03311 [Expand All](#) [Printable Version](#)

Request #: 00010224	Submitted By:	Status: Pending
User ID: PH12345	Name:	
Phone: 333-333-3333	Email: email@email.org	
Type: SCHOOL	Access Code: 00123400	Institution: UNIVERSITY ✓
Created: 11/30/2011	Approved on: 11/30/2011 11:51:47	Approving Authority: James Smith ✓

User Access Changes : Pending for ESO

▼ [School Reports](#)

System	Description	Action	Authoritative FLS Source	ESO
Reports	Adding: FedLoan Servicing Default Prevention		✓	✓

► [Action / Status History](#)

[BACK](#) [Cancel Request](#)

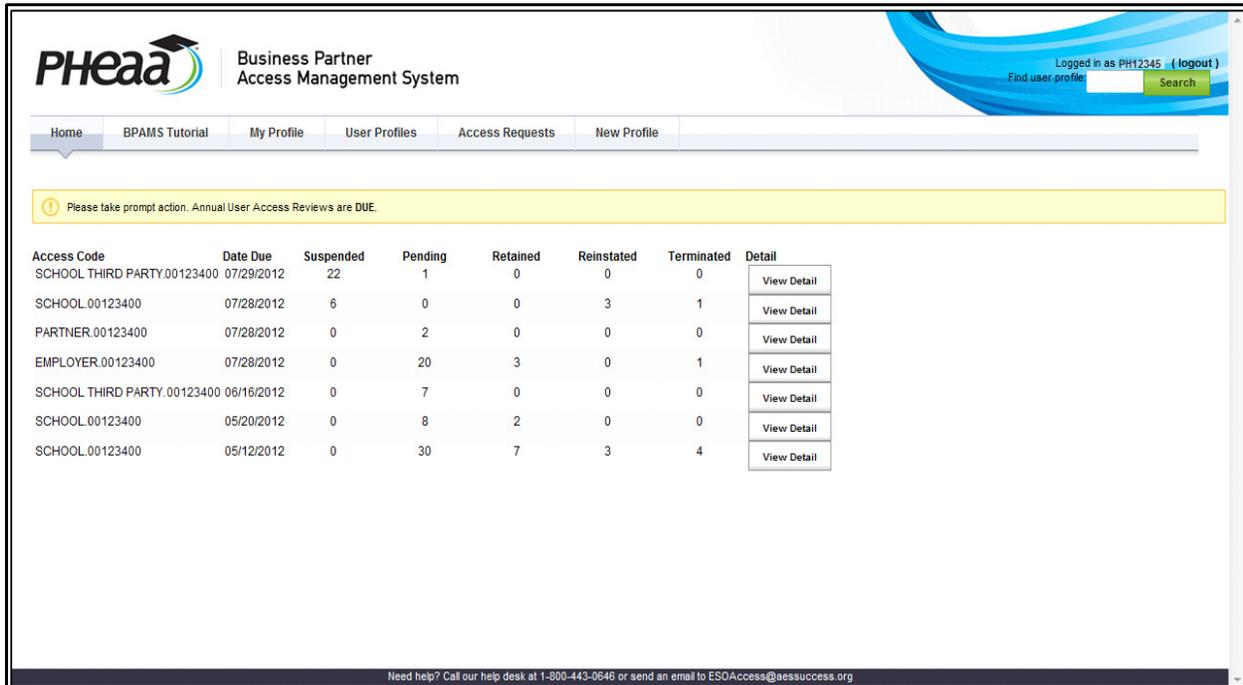
Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAAccess@aessuccess.org

To approve, deny or cancel an access request, see [Approving, Denying and Canceling Pending Requests](#) for more information.

To terminate a user profile, see [Submitting a Request to Terminate a User Profile](#).

Viewing User Profiles and Access Privileges

After logging into the Business Partners Access Management System, users and the Authoritative Source can view their profile and access privileges and submit requests to change access.



The screenshot shows the Business Partner Access Management System interface. At the top, there is a navigation menu with options: Home, BPAMS Tutorial, My Profile, User Profiles, Access Requests, and New Profile. A yellow banner displays a warning: "Please take prompt action. Annual User Access Reviews are DUE." Below this is a table with the following columns: Access Code, Date Due, Suspended, Pending, Retained, Reinstated, Terminated, and Detail. Each row in the table has a "View Detail" button next to it.

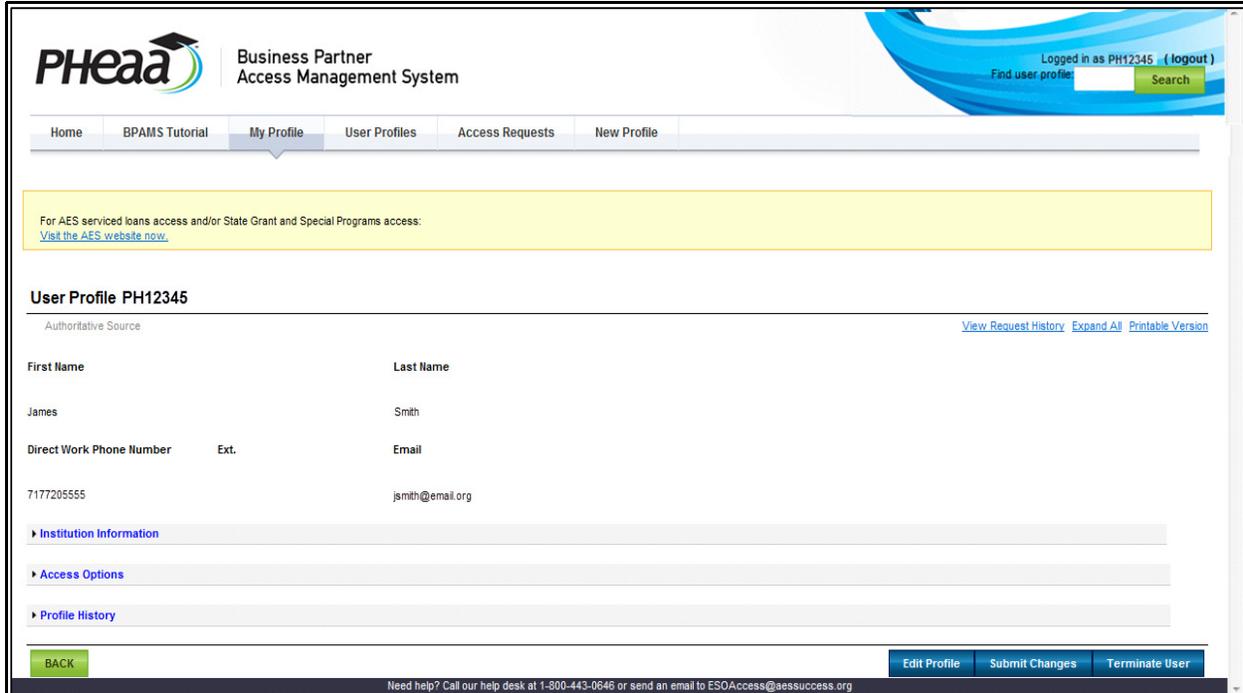
Access Code	Date Due	Suspended	Pending	Retained	Reinstated	Terminated	Detail
SCHOOL THIRD PARTY.00123400	07/29/2012	22	1	0	0	0	View Detail
SCHOOL.00123400	07/28/2012	6	0	0	3	1	View Detail
PARTNER.00123400	07/28/2012	0	2	0	0	0	View Detail
EMPLOYER.00123400	07/28/2012	0	20	3	0	1	View Detail
SCHOOL THIRD PARTY.00123400	06/16/2012	0	7	0	0	0	View Detail
SCHOOL.00123400	05/20/2012	0	8	2	0	0	View Detail
SCHOOL.00123400	05/12/2012	0	30	7	3	4	View Detail

Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

1. To view your own user profile and access privileges or to submit a request to change access, click **My Profile** on the Business Partner Access Management System home page.

NOTE: To view another user’s profile and access privileges, use the search features to search for a user profile or an open access request. See the [Searching for User Profiles and Open Access Requests](#) section of this user procedure for step-by-step instructions.

The user's profile page displays.



The screenshot shows the PHEAA Business Partner Access Management System interface. At the top left is the PHEAA logo. To its right, the text reads "Business Partner Access Management System". In the top right corner, it says "Logged in as PH12345 (logout)" and "Find user profile:" followed by a search box and a "Search" button. Below this is a navigation menu with tabs: Home, BPAMS Tutorial, My Profile (selected), User Profiles, Access Requests, and New Profile. A yellow banner contains the text: "For AES serviced loans access and/or State Grant and Special Programs access: [Visit the AES website now.](#)". The main content area is titled "User Profile PH12345" and includes links for "View Request History", "Expand All", and "Printable Version". The profile information is as follows:

First Name	Last Name
James	Smith

Direct Work Phone Number	Ext.	Email
7177205555		jsmith@email.org

Below the profile information are three expandable sections: "Institution Information", "Access Options", and "Profile History". At the bottom left is a "BACK" button, and at the bottom right are "Edit Profile", "Submit Changes", and "Terminate User" buttons. A footer at the very bottom reads: "Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org".

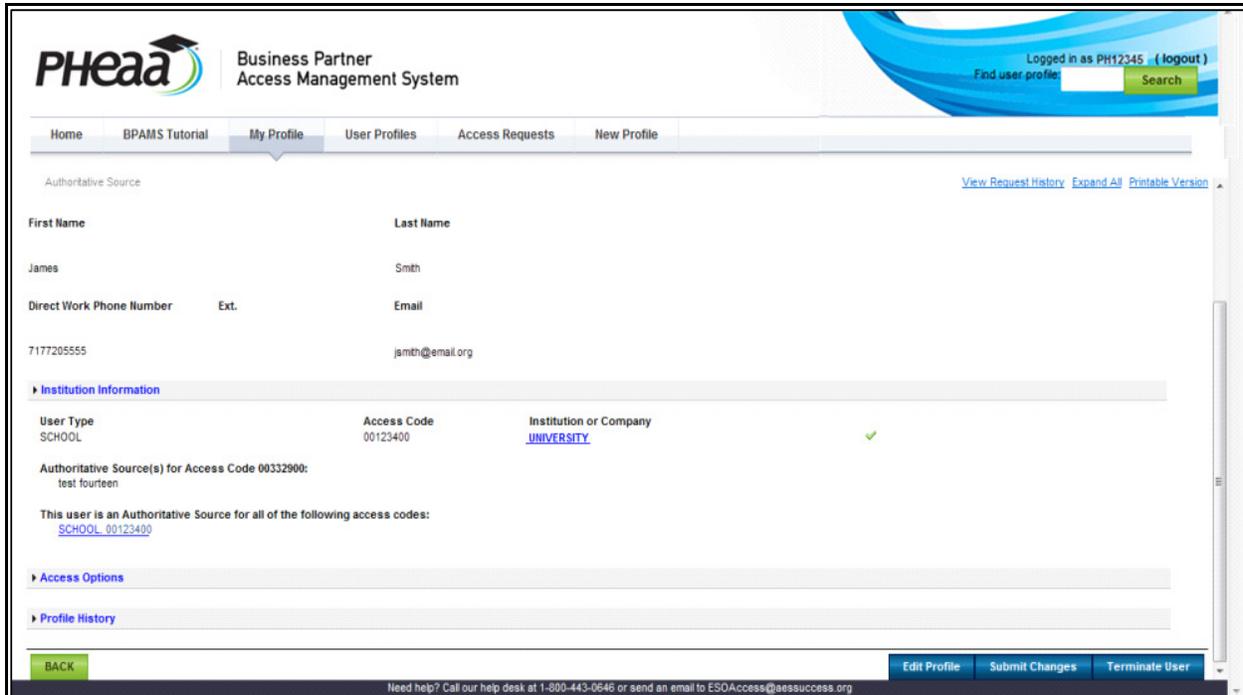
A link to the AES Web site displays at the top of the page.

The **User Profile** section displays the user's identifying information.

NOTE: To update demographic information, click **Edit Profile**. See user guide **WB0120-Web Login & Authentication for Partners_User Guide_AES** for instructions on updating the user profile.

2. Click **Institution Information** to expand that section.

The **User Profile** page redisplay with the **Institution Information** section expanded.



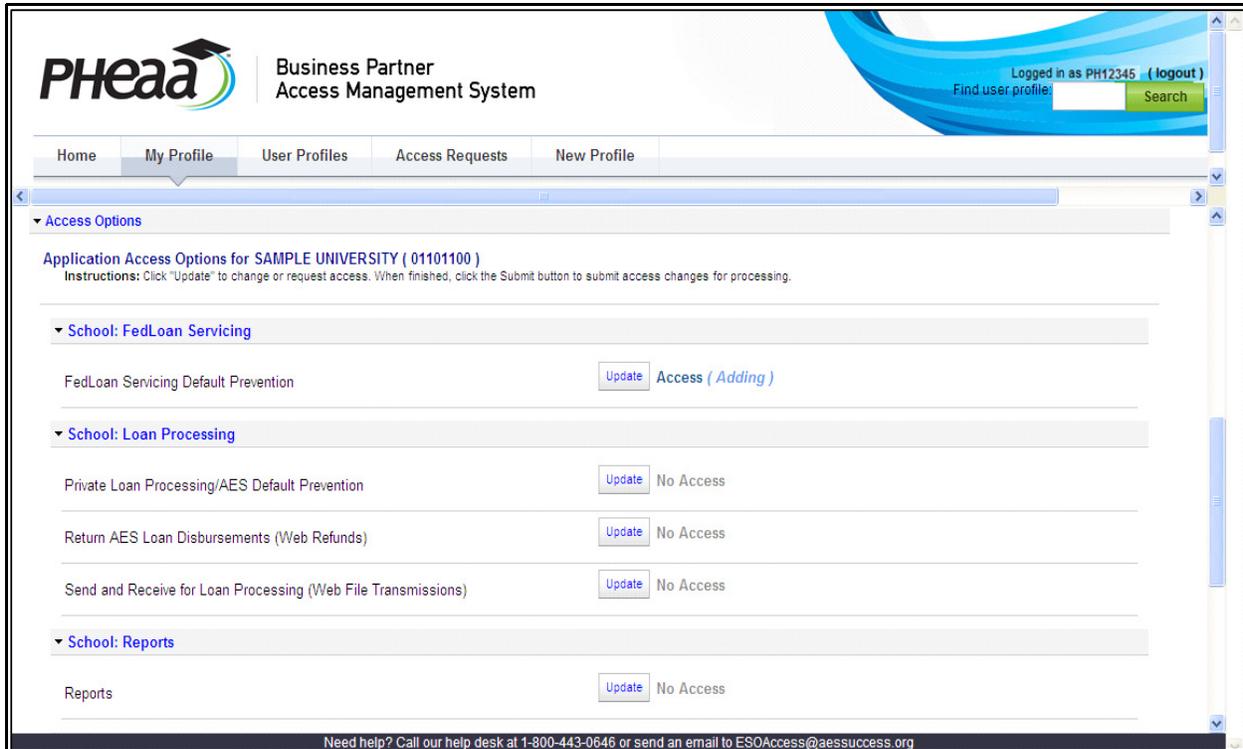
The **User Type**, **Access Code** and **Institution or Company** fields are protected and cannot be updated by the user. Click on the link in the **Institution or Company** field to view the institution’s profile.

Authoritative Source(s) for Access Code XXXXXXXX displays a list of the Authoritative Sources for the organization’s access code.

This user is an Authoritative Source for all of the following access codes displays a list of access codes for which the user is an Authoritative Source. This displays only if the user is an authoritative source.

3. Click **Access Options** to expand that section.

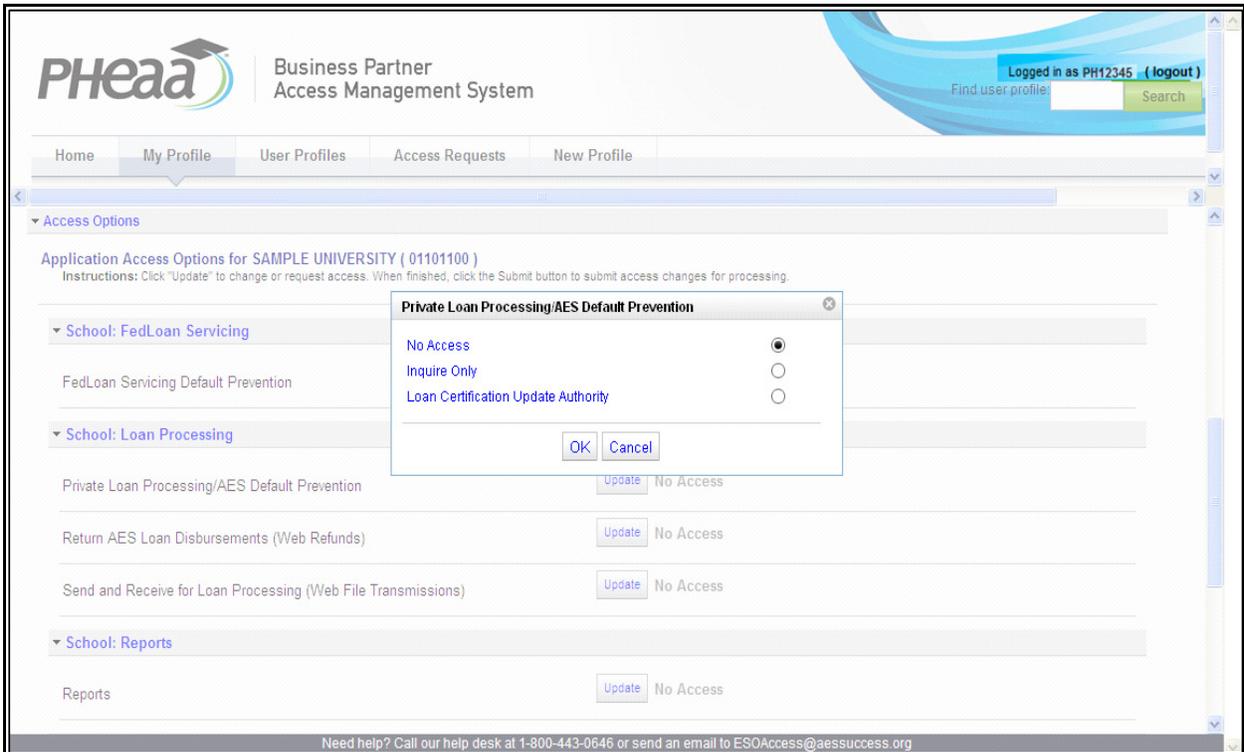
The **User Profile** page redisplay with the **Access Options** section expanded.



The screenshot displays the PHEAA Business Partner Access Management System interface. The top navigation bar includes 'Home', 'My Profile', 'User Profiles', 'Access Requests', and 'New Profile'. The 'My Profile' tab is active. The 'Access Options' section is expanded, showing 'Application Access Options for SAMPLE UNIVERSITY (01101100)'. Below this, there are three school categories: 'School: FedLoan Servicing', 'School: Loan Processing', and 'School: Reports'. Each category lists resources with an 'Update' button and the current access status. For 'School: FedLoan Servicing', 'FedLoan Servicing Default Prevention' has 'Access (Adding)'. For 'School: Loan Processing', 'Private Loan Processing/AES Default Prevention', 'Return AES Loan Disbursements (Web Refunds)', and 'Send and Receive for Loan Processing (Web File Transmissions)' all have 'No Access'. For 'School: Reports', 'Reports' has 'No Access'. A footer note reads: 'Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org'.

4. In the **Access Options** section of the profile, click **Update** to the right of the resource to submit a request to change access privileges.

A dialog box displays with the access options for the selected resource. The access options that display depend on the resource selected.



The screenshot displays the Business Partner Access Management System interface. The top navigation bar includes 'Home', 'My Profile', 'User Profiles', 'Access Requests', and 'New Profile'. The user is logged in as PH12345. The main content area shows 'Application Access Options for SAMPLE UNIVERSITY (01101100)' with instructions to click 'Update' to change access. A dialog box titled 'Private Loan Processing/AES Default Prevention' is open, showing three radio button options: 'No Access' (selected), 'Inquire Only', and 'Loan Certification Update Authority'. The dialog box has 'OK' and 'Cancel' buttons. The background interface lists various access options with 'Update' buttons and 'No Access' status.

5. Select an access option and click **OK**. Click **Cancel** to return to the **Access Options** page without making a selection.

The **Access Options** section of the **My Access** page redisplay.

PHEAA Business Partner Access Management System

Logged in as PH12345 (logout)
Find user profile: Search

Home My Profile User Profiles Access Requests New Profile

Access Options

Application Access Options for SAMPLE UNIVERSITY (01101100)
Instructions: Click "Update" to change or request access. When finished, click the Submit button to submit access changes for processing.

School: FedLoan Servicing

FedLoan Servicing Default Prevention Access (Adding)

School: Loan Processing

Private Loan Processing/AES Default Prevention No Access
Adding Inquire Only

Return AES Loan Disbursements (Web Refunds) No Access

Send and Receive for Loan Processing (Web File Transmissions) No Access

School: Reports

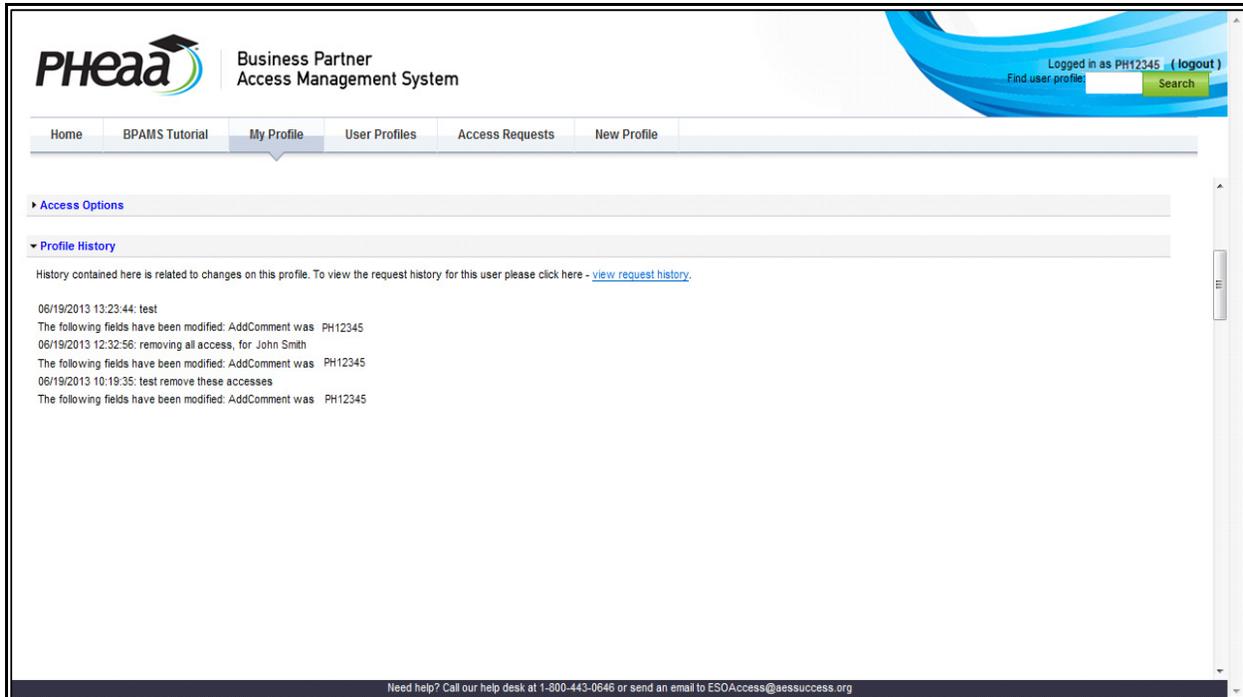
Reports No Access

Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org

A message displays below the resource indicating that the access option has been changed.

6. Click **Profile History**, not shown, to expand that section.

The **User Profile** page redisplay with the **Profile History** section expanded.



The screenshot shows the PHEAA Business Partner Access Management System interface. The top navigation bar includes links for Home, BPAMS Tutorial, My Profile (selected), User Profiles, Access Requests, and New Profile. The main content area is divided into sections: Access Options and Profile History. The Profile History section is expanded, displaying a list of actions taken on the profile, including timestamps and descriptions of changes. A search bar is visible in the top right corner, and a footer contains contact information for help.

Logged in as PH12345 - (logout)
Find user profile: Search

Home BPAMS Tutorial **My Profile** User Profiles Access Requests New Profile

▸ Access Options

▾ Profile History

History contained here is related to changes on this profile. To view the request history for this user please click here - [view request history](#).

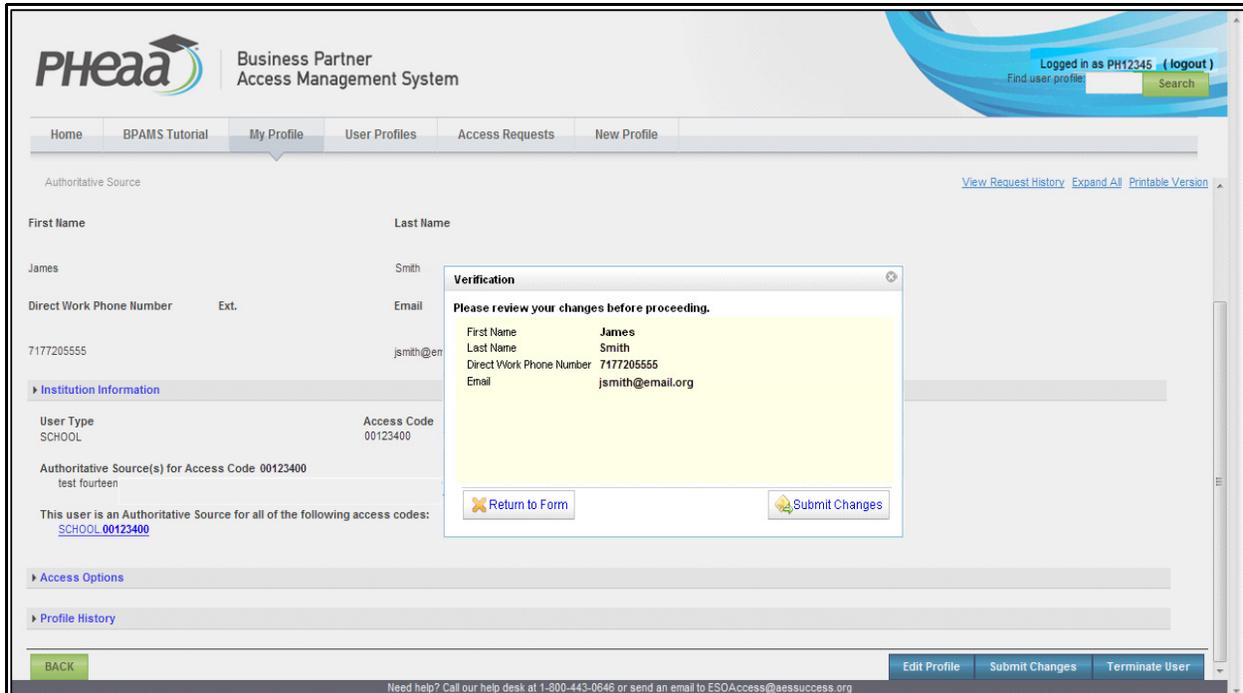
06/19/2013 13:23:44: test
The following fields have been modified: AddComment was PH12345
06/19/2013 12:32:58: removing all access, for John Smith
The following fields have been modified: AddComment was PH12345
06/19/2013 10:19:35: test remove these accesses
The following fields have been modified: AddComment was PH12345

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The **Profile History** section displays a history of the actions taken on the profile.

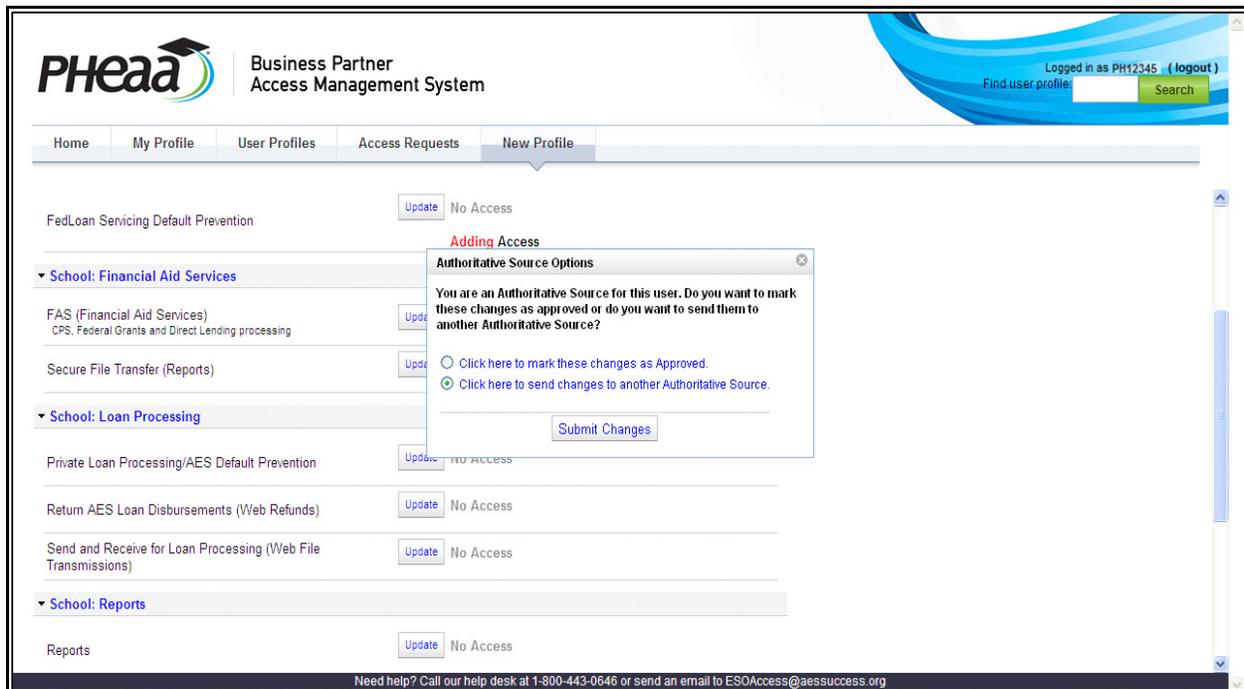
7. Click **Submit Changes** at the bottom of the **My Access** page.

The **Verification** dialog box displays.



- Review the changes and click **Submit Changes** to submit the changes. Click **Return to Form** to return to the user profile without submitting the changes.

The **Authoritative Source Options** dialog box displays if the request for access is submitted by an authoritative source.

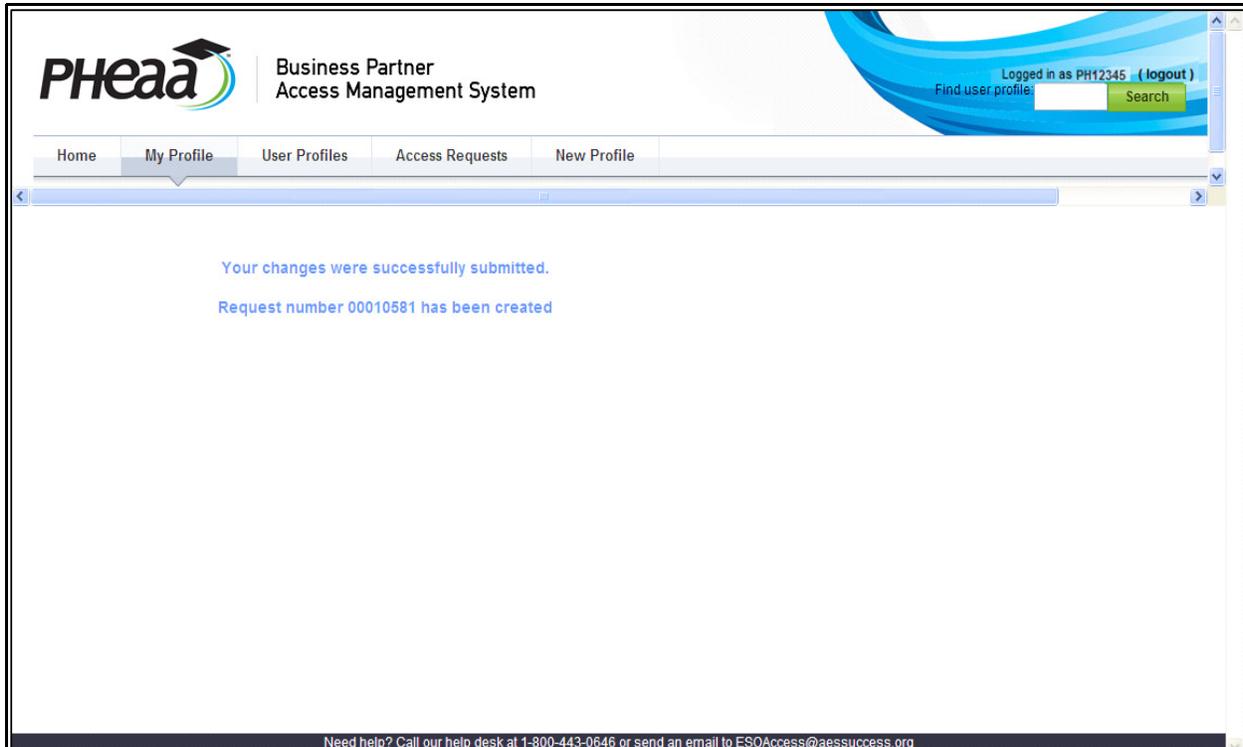


9. Select one of the following options. Click the radio button to make a selection.

- **Click here to mark these changes as Approved.**
- **Click here to send changes to another Authoritative Source.**

10. Click **Submit Changes**.

The following message displays: **Your changes were successfully submitted.**



If access changes were made, the following message displays: **Request number XXXXXXXX has been created.**

When a request to change access privileges is submitted, a notification email is sent to the user's Authoritative Source notifying them that an access request is pending.

Once the request is approved by the Authoritative Source, it is sent to the Business Unit Approver for final approval before it is completed by the Enterprise Security Office.

NOTE: Changes to user profile information do not generate an email or a request.

Approving, Denying and Canceling Pending Requests

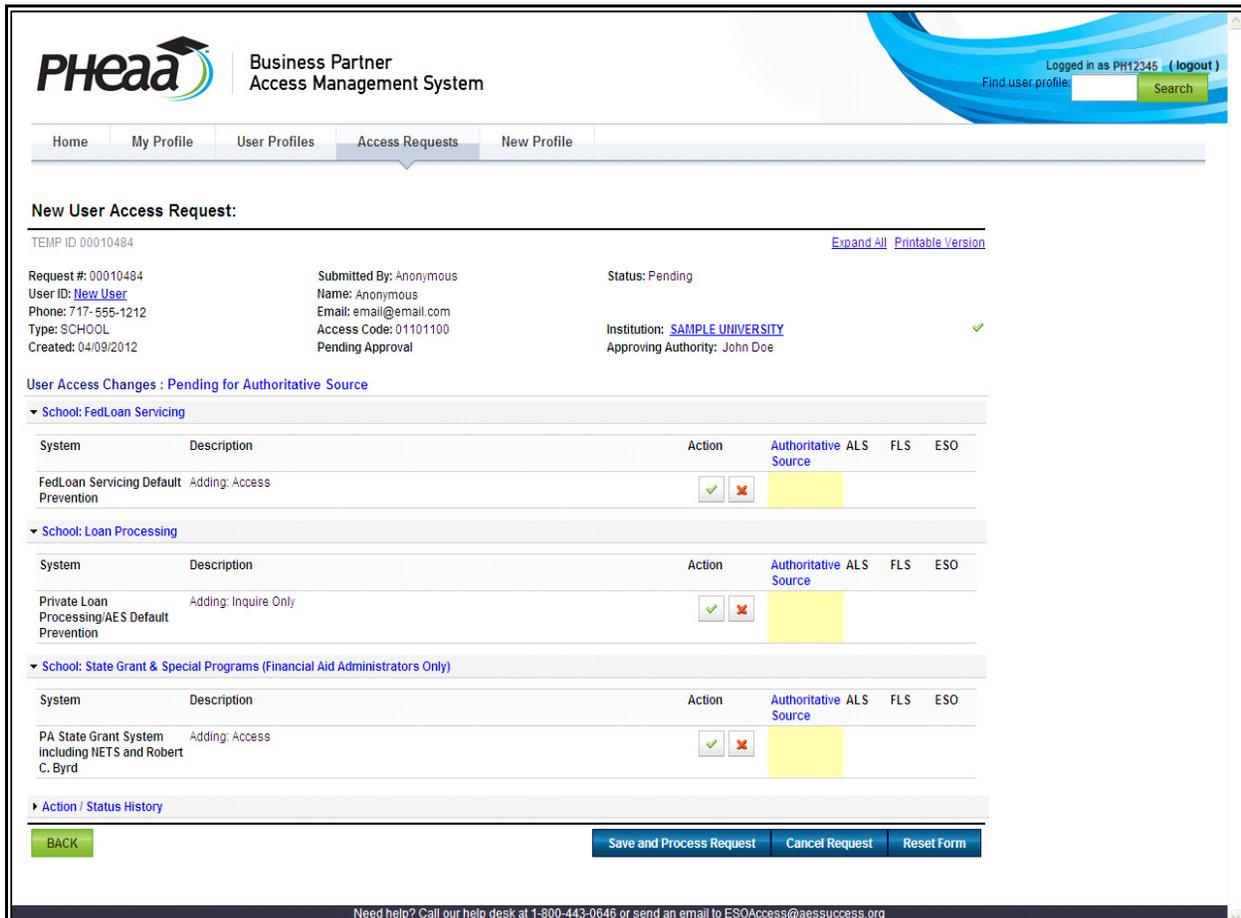
All access requests must be approved by the requestor's Authoritative Source before they can be approved and completed by PHEAA's business units and the Enterprise Security Office. If an institution has more than one Authoritative Source, only one approval is necessary.

Authoritative Source(s) can access pending requests from a notification email link or by searching on the Business Partners Access Management Home page or the **Access Requests** page.

To access a pending request from a notification email link or from the Home page or **Access Requests** page, see [Logging into the Business Partner Access Management System](#) or [Searching for User Profiles and Open Access Requests](#).

Approving and Denying a Pending Access Request

Follow the steps in this section to approve or deny a pending access request.



PHEAA Business Partner Access Management System

Logged in as PH12345 - (logout)
Find user profile: Search

Home | My Profile | User Profiles | **Access Requests** | New Profile

New User Access Request:

TEMP ID: 00010484 [Expand All](#) [Printable Version](#)

Request #: 00010484 Submitted By: Anonymous Status: Pending
 User ID: [New User](#) Name: Anonymous
 Phone: 717-555-1212 Email: email@email.com
 Type: SCHOOL Access Code: 01101100 Institution: [SAMPLE UNIVERSITY](#) ✓
 Created: 04/09/2012 Pending Approval Approving Authority: John Doe

User Access Changes : Pending for Authoritative Source

▼ **School: FedLoan Servicing**

System	Description	Action	Authoritative Source	ALS	FLS	ESO
FedLoan Servicing Default Prevention	Adding: Access	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

▼ **School: Loan Processing**

System	Description	Action	Authoritative Source	ALS	FLS	ESO
Private Loan Processing/AES Default Prevention	Adding: Inquire Only	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

▼ **School: State Grant & Special Programs (Financial Aid Administrators Only)**

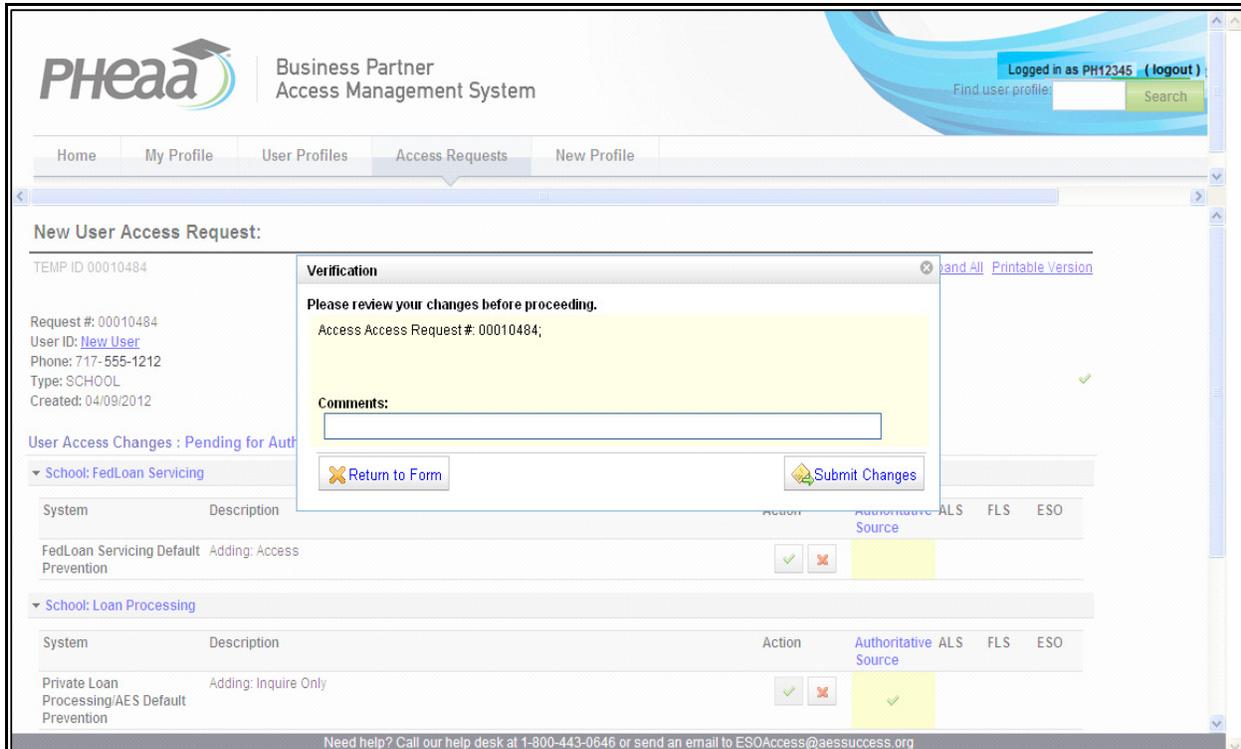
System	Description	Action	Authoritative Source	ALS	FLS	ESO
PA State Grant System including NETS and Robert C. Byrd	Adding: Access	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

▶ **Action / Status History**

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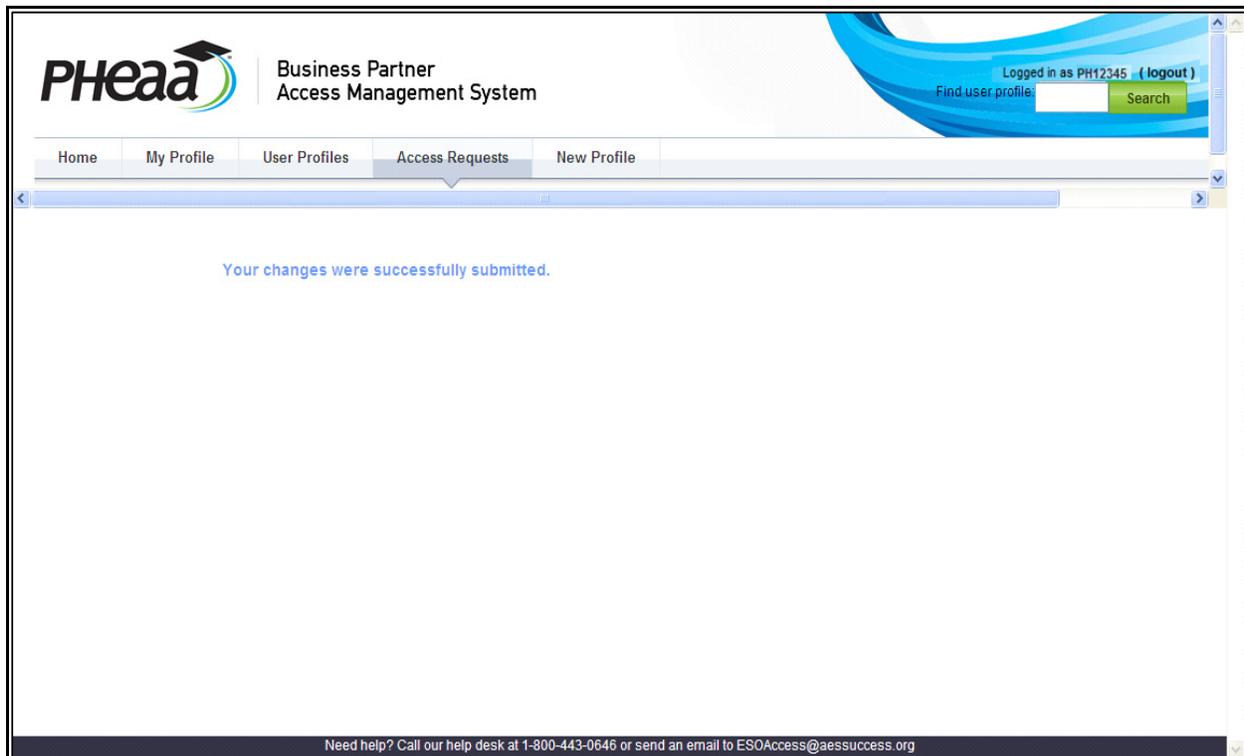
1. In the **Action** field, click the green checkmark to approve the pending access request or click the red “X” to deny it.
2. Click **Save and Process Request** to save the changes and process the access request. Click **Reset Form** to reset the access request form.

The **Verification** dialog box displays.



3. In the **Comments** field, enter a comment. *This field is optional.*
4. Click **Submit Changes** to submit the changes or click **Return to Form** to return to the **Access Request** page without submitting the changes.

The **Access Request** page redisplay with the following message: **Your changes were successfully submitted.**



When a request to change access privileges is approved by the authoritative source(s), a notification email is sent to the business unit approver(s) notifying them that an access request is pending.

Once the request is approved by the business unit approver(s), a notification email is sent to Enterprise Security Office notifying them that an access request is pending.

When an access request is denied, notification emails are sent to the requestor and the authoritative source(s) notifying them that the access request has been denied.

Canceling a Pending Access Request

PHEAA Business Partner Access Management System

Logged in as PH12345 (logout)
Find user profile:

Home | My Profile | User Profiles | **Access Requests** | New Profile

New User Access Request:

TEMP ID 00010484 [Expand All](#) [Printable Version](#)

Request #: 00010484 Submitted By: Anonymous Status: Pending
 User ID: [New User](#) Name: Anonymous
 Phone: 717-555-1212 Email: email@email.com
 Type: SCHOOL Access Code: 01101100 Institution: [SAMPLE UNIVERSITY](#) ✓
 Created: 04/09/2012 Pending Approval Approving Authority: John Doe

User Access Changes : Pending for Authoritative Source

▼ School: FedLoan Servicing

System	Description	Action	Authoritative Source	ALS	FLS	ESO
FedLoan Servicing Default Prevention	Adding: Access	<input type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

▼ School: Loan Processing

System	Description	Action	Authoritative Source	ALS	FLS	ESO
Private Loan Processing/AES Default Prevention	Adding: Inquire Only	<input type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

▼ School: State Grant & Special Programs (Financial Aid Administrators Only)

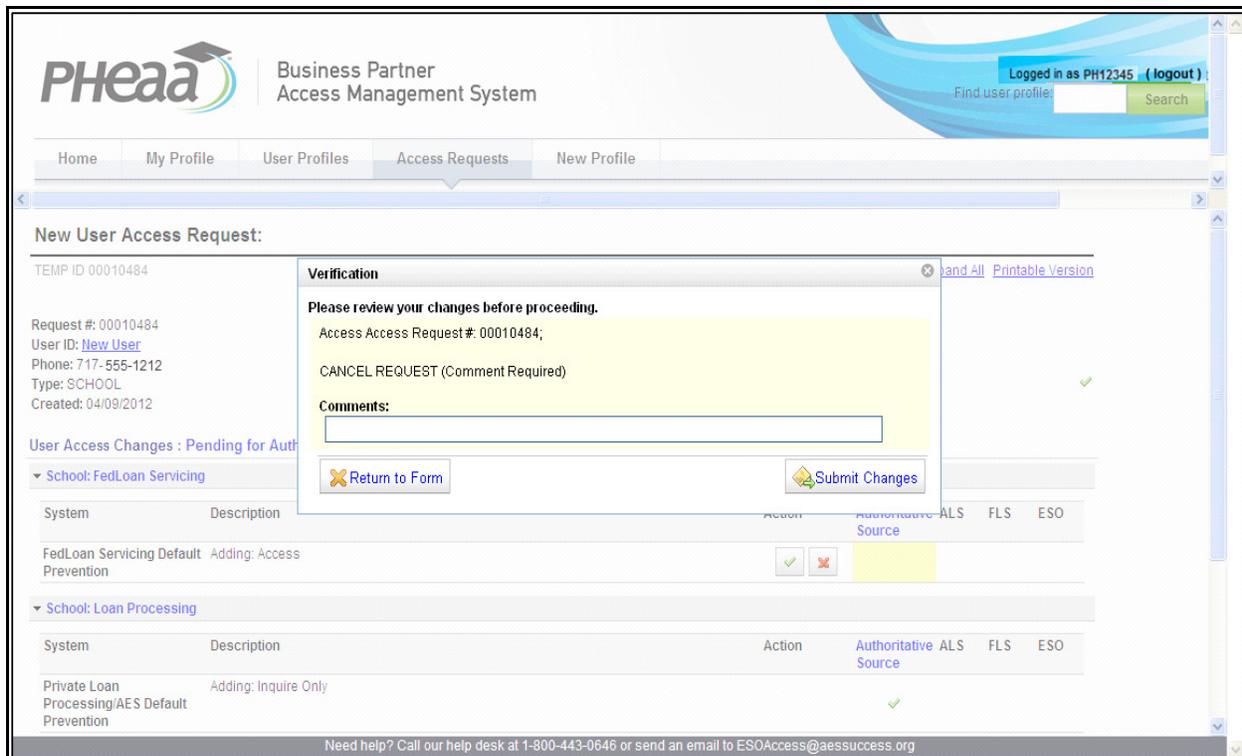
System	Description	Action	Authoritative Source	ALS	FLS	ESO
PA State Grant System including NETS and Robert C. Byrd	Adding: Access	<input type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

▶ Action / Status History

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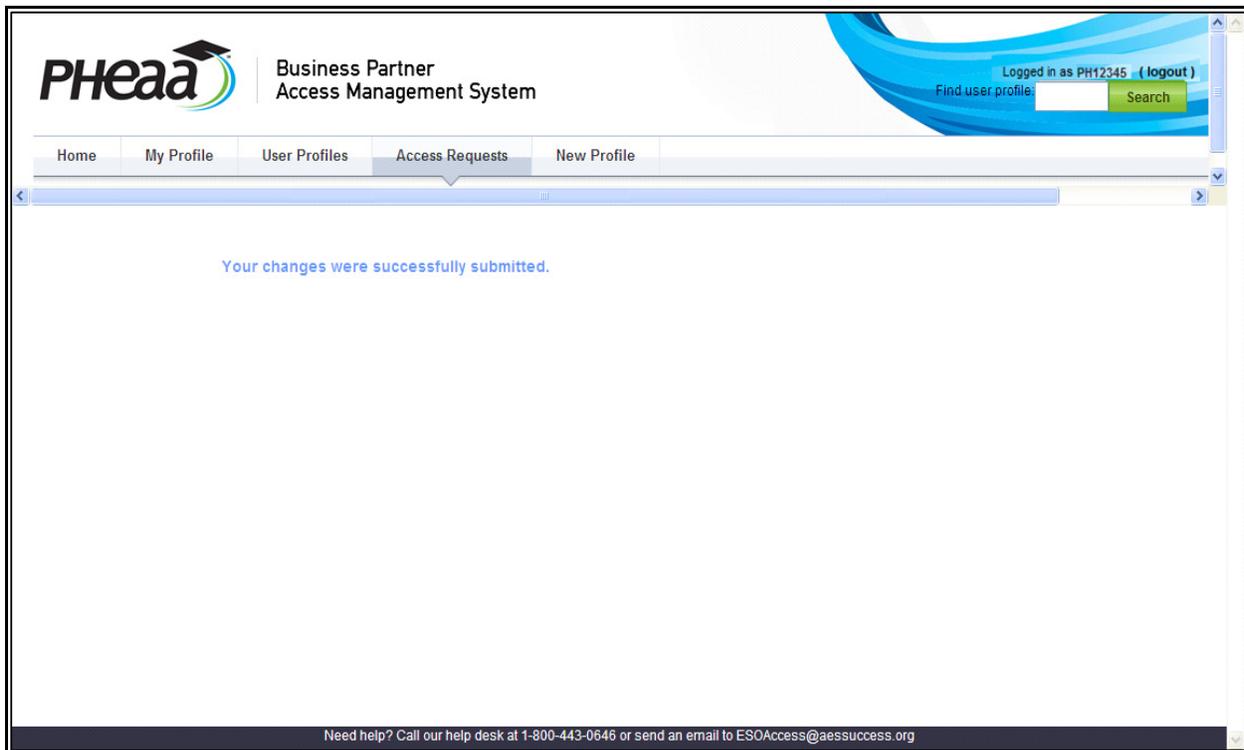
1. To cancel a pending request, click **Cancel Request**.

The **Verification** dialog box displays.



2. In the **Comments** field, enter a comment. *This field is required when canceling a request.*
3. Click **Submit Changes** to submit the changes or click **Return to Form** to return to the **Access Request** page without submitting the changes.

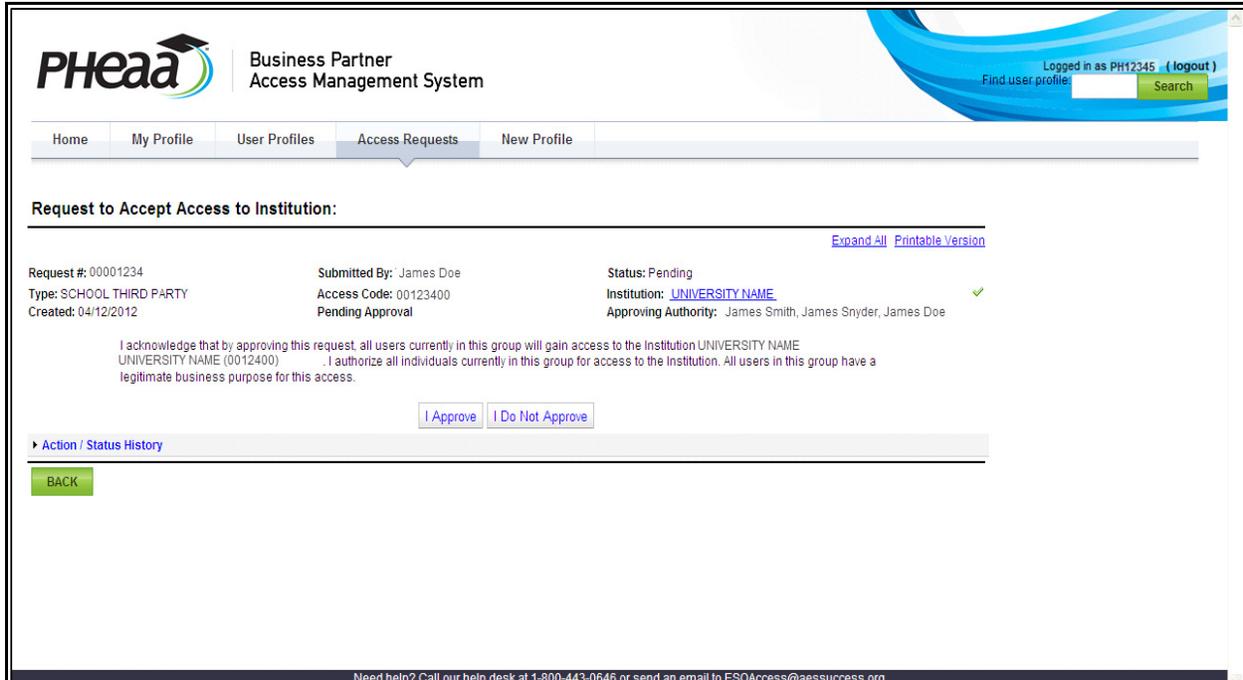
The **Access Request** page redisplay with the following message: **Your changes were successfully submitted.**



When an access request is canceled, notification emails are sent to the requestor and the authoritative source(s) notifying them that the access request has been canceled.

Approving and Denying Third Party Requests

When an institution submits a form to grant access to a third party, a notification email is sent to the third-party authoritative source(s) notifying them that a request to accept access is pending. The third-party authoritative source(s) must confirm that their users may be granted access to the new institution's information.



The screenshot displays the BPAMS interface. At the top left is the PHEAA logo and the text 'Business Partner Access Management System'. On the top right, it shows 'Logged in as PH12345 (logout)' and a search bar for user profiles. A navigation menu includes 'Home', 'My Profile', 'User Profiles', 'Access Requests' (which is highlighted), and 'New Profile'. The main content area is titled 'Request to Accept Access to Institution:'. It includes links for 'Expand All' and 'Printable Version'. The request details are as follows:

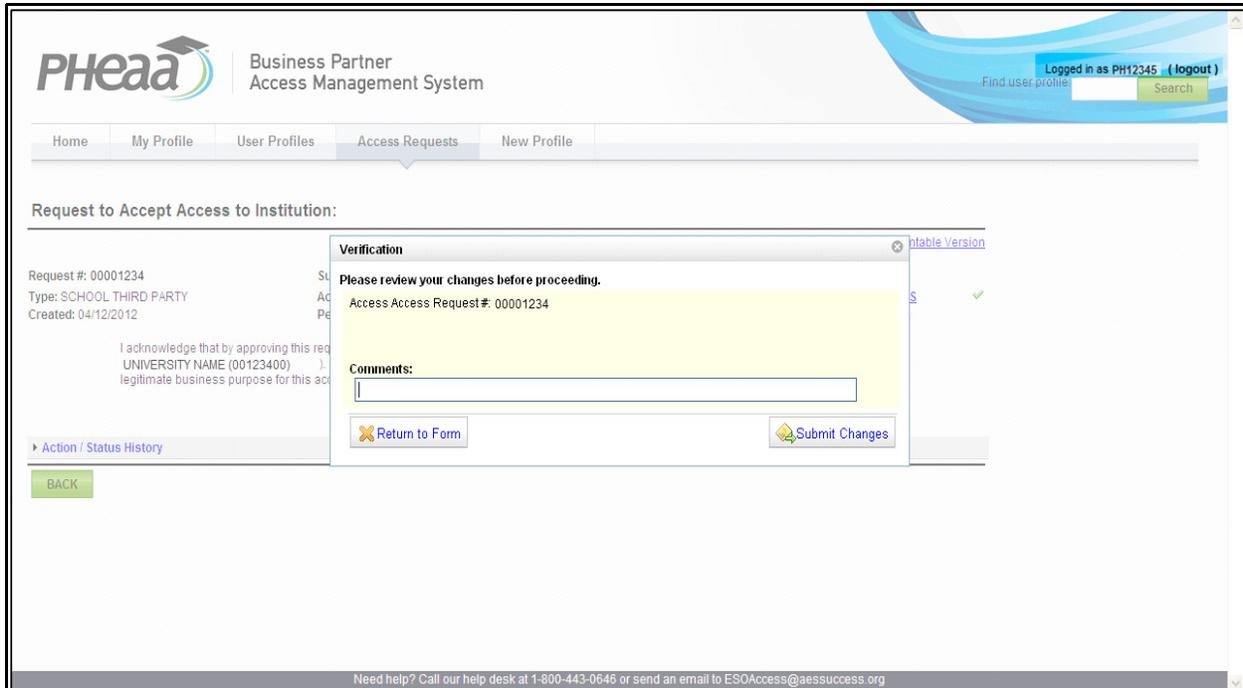
Request #: 00001234	Submitted By: James Doe	Status: Pending
Type: SCHOOL THIRD PARTY	Access Code: 00123400	Institution: UNIVERSITY NAME ✓
Created: 04/12/2012	Pending Approval	Approving Authority: James Smith, James Snyder, James Doe

Below the details is a paragraph of acknowledgment text: 'I acknowledge that by approving this request, all users currently in this group will gain access to the Institution UNIVERSITY NAME UNIVERSITY NAME (0012400). I authorize all individuals currently in this group for access to the Institution. All users in this group have a legitimate business purpose for this access.' At the bottom of this section are two buttons: 'I Approve' and 'I Do Not Approve'. Below this is a section for 'Action / Status History' with a 'BACK' button.

Need help? Call our help desk at 1-800-443-0646 or send an email to FSOAccess@aesuccess.org

1. To confirm the access privileges of the third-party users, click **I Agree**, or to deny access, click **I Do Not Agree**.

The **Verification** dialog box displays.



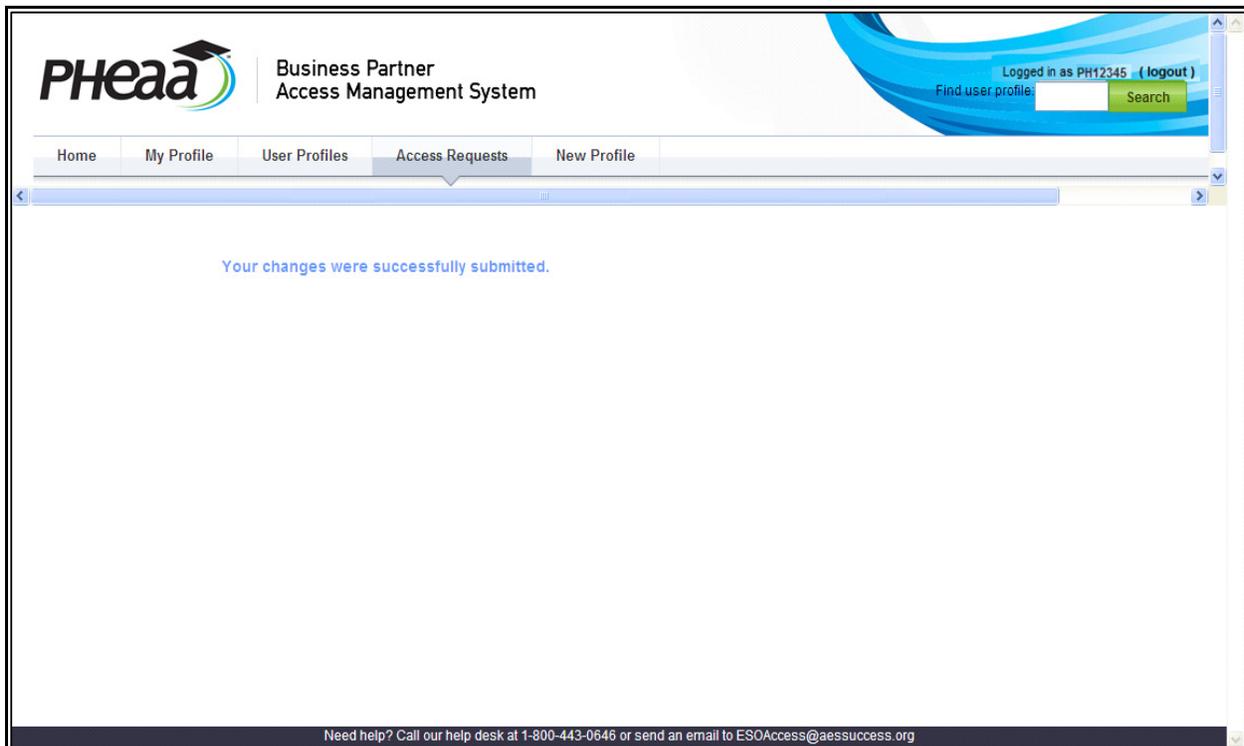
The screenshot shows the PHEAA Business Partner Access Management System interface. The main page displays a "Request to Accept Access to Institution" for request # 00001234, created on 04/12/2012. A "Verification" dialog box is open, prompting the user to "Please review your changes before proceeding." The dialog box contains the following information:

- Request #: 00001234
- Type: SCHOOL THIRD PARTY
- Created: 04/12/2012
- Access Access Request#: 00001234
- Comments: (empty text field)

At the bottom of the dialog box, there are two buttons: "Return to Form" and "Submit Changes". The main page also features a "BACK" button and a footer with contact information: "Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org".

2. In the **Comments** field, enter a comment. *This field is optional.*
3. Click **Submit Changes** to submit the changes or click **Return to Form** to return to the **Access Request** page without submitting the changes.

The **Access Request** page redisplay with the following message: **Your changes were successfully submitted.**

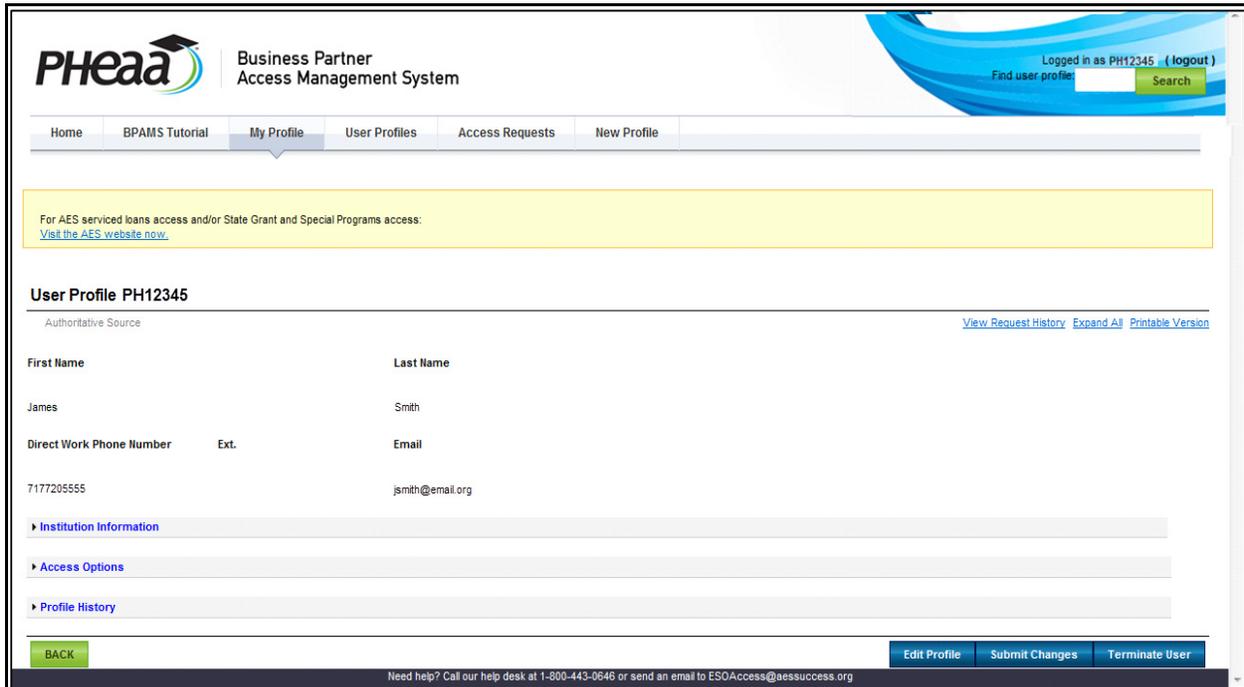


When third-party user access privileges are approved by the third-party authoritative source(s), a notification email is sent to the Enterprise Security Office notifying them that an access request is pending. The Enterprise Security Office completes the request by granting access to the institution.

When an access request is denied, notification emails are sent to the business unit administrator notifying them that the access request has been denied.

Submitting a Request to Terminate a User Profile

When a user ID and profile are no longer needed, the Authoritative Source(s) must submit a request to terminate the user's ID and profile.



The screenshot displays the BPAMS interface. At the top left is the PHEAA logo and the text "Business Partner Access Management System". On the top right, it shows "Logged in as PH12345 (logout)" and a search bar with "Find user profile:" and a "Search" button. A navigation menu includes "Home", "BPAMS Tutorial", "My Profile", "User Profiles", "Access Requests", and "New Profile". Below the menu is a yellow banner with text: "For AES serviced loans access and/or State Grant and Special Programs access: [Visit the AES website now.](#)". The main content area is titled "User Profile PH12345" and includes links for "View Request History", "Expand All", and "Printable Version". The profile details are as follows:

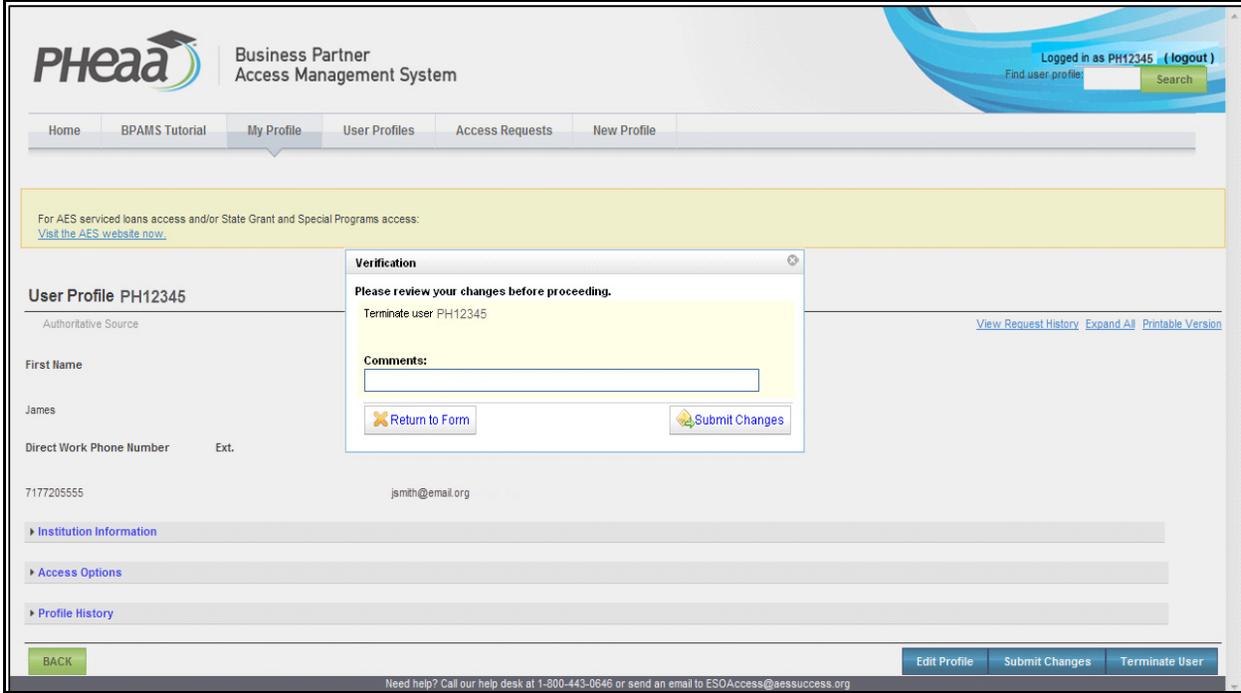
Authoritative Source		
First Name	Last Name	
James	Smith	
Direct Work Phone Number	Ext.	Email
7177205555		jsmith@email.org

Below the profile details are expandable sections for "Institution Information", "Access Options", and "Profile History". At the bottom of the profile page are buttons for "BACK", "Edit Profile", "Submit Changes", and "Terminate User". A footer note reads: "Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org".

To access an active user profile from a notification email link or to search for a user profile, see [Logging into the Business Partner Access Management System](#) or [Searching for User Profiles and Open Access Requests](#).

1. To terminate an active user profile, click **Terminate User**.

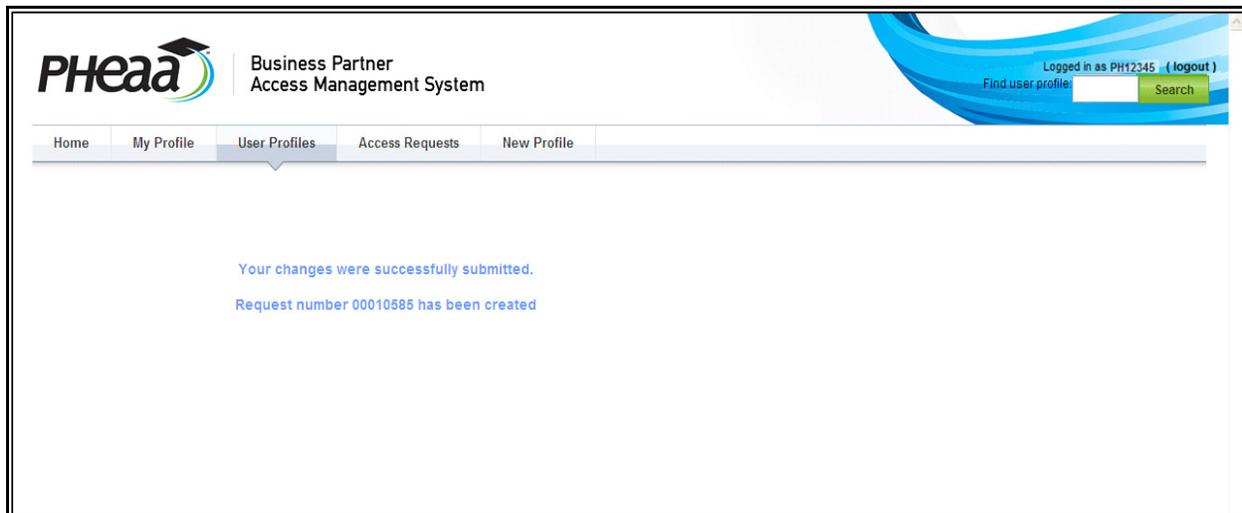
A **Verification** dialog box displays.



The screenshot displays the Business Partner Access Management System (BPAMS) interface. The top navigation bar includes links for Home, BPAMS Tutorial, My Profile, User Profiles, Access Requests, and New Profile. The user is logged in as PH12345. The main content area shows the user profile for PH12345, with fields for First Name (James), Direct Work Phone Number (7177205555), and Ext. A verification dialog box is overlaid on the profile, prompting the user to review changes before proceeding. The dialog box contains the text "Please review your changes before proceeding." and "Terminate user PH12345". Below this, there is a "Comments:" field with a text input box. At the bottom of the dialog box, there are two buttons: "Return to Form" and "Submit Changes". The user profile page also includes sections for Institution Information, Access Options, and Profile History. A "BACK" button is located at the bottom left of the profile page, and "Edit Profile", "Submit Changes", and "Terminate User" buttons are at the bottom right.

2. In the **Comments** field, enter a comment. *This field is optional.*
3. Click **Submit Changes** to submit the changes or click **Return to Form** to return to the **Access Request** page without submitting the changes.

The **User Profiles** page redisplay with the following message: **Your changes were successfully submitted. Request number XXXXXXXX has been created.**

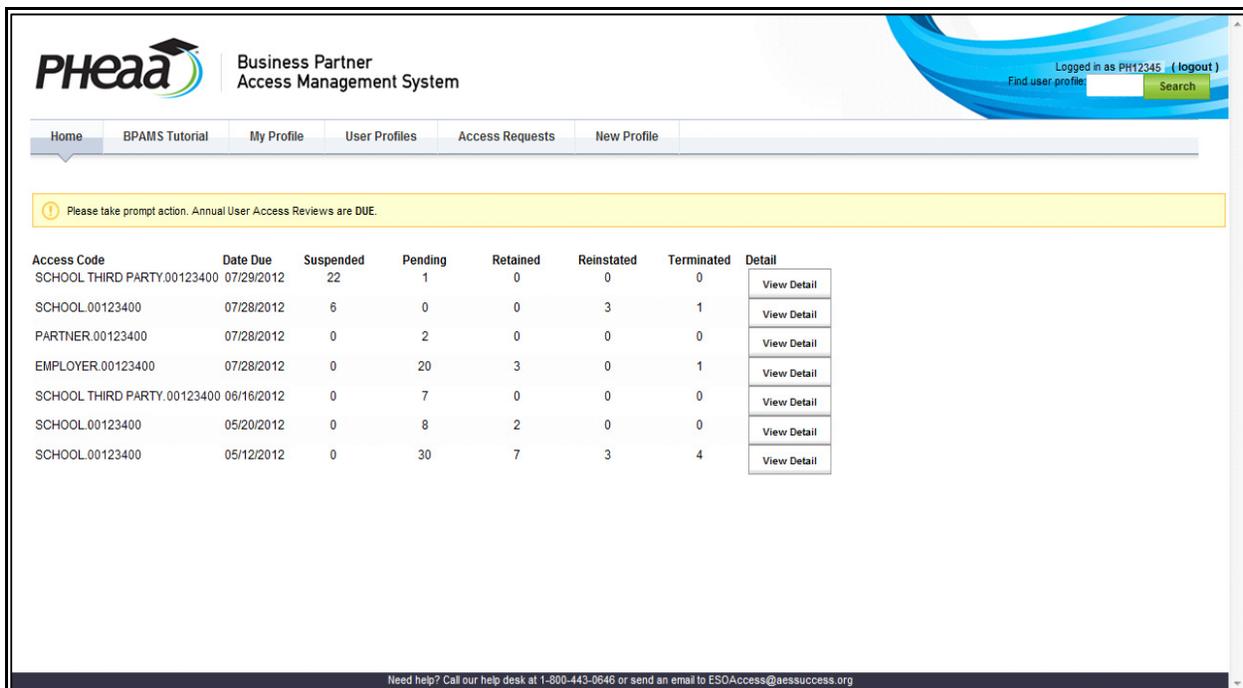


Once a termination request is submitted, a notification email is sent to the Enterprise Security Office notifying them that a termination request is pending. The Enterprise Security Office terminates the user ID and profile and completes the termination request. When a user ID and profile are terminated, access to PHEAA resources is revoked.

Completing a User Access Review

The Authoritative Source is required to perform a yearly access review for all users at their institution. The review is due one year from the date the Remote Access, Confidentiality and Indemnification Agreement and Authentication is fully executed. Thirty days before the review is due, the Authoritative Source receives a notification email with a link to the User Access Review summary on the Business Partners Access Management System Home page.

To log into the Business Partners Access Management System, see [Logging into the Business Partner Access Management System](#).



Access Code	Date Due	Suspended	Pending	Retained	Reinstated	Terminated	Detail
SCHOOL THIRD PARTY.00123400	07/29/2012	22	1	0	0	0	View Detail
SCHOOL.00123400	07/28/2012	6	0	0	3	1	View Detail
PARTNER.00123400	07/28/2012	0	2	0	0	0	View Detail
EMPLOYER.00123400	07/28/2012	0	20	3	0	1	View Detail
SCHOOL THIRD PARTY.00123400	06/16/2012	0	7	0	0	0	View Detail
SCHOOL.00123400	05/20/2012	0	8	2	0	0	View Detail
SCHOOL.00123400	05/12/2012	0	30	7	3	4	View Detail

The **Home** page displays a User Access Review summary for each of the Access Codes, or institutions, for which the Authoritative Source is responsible.

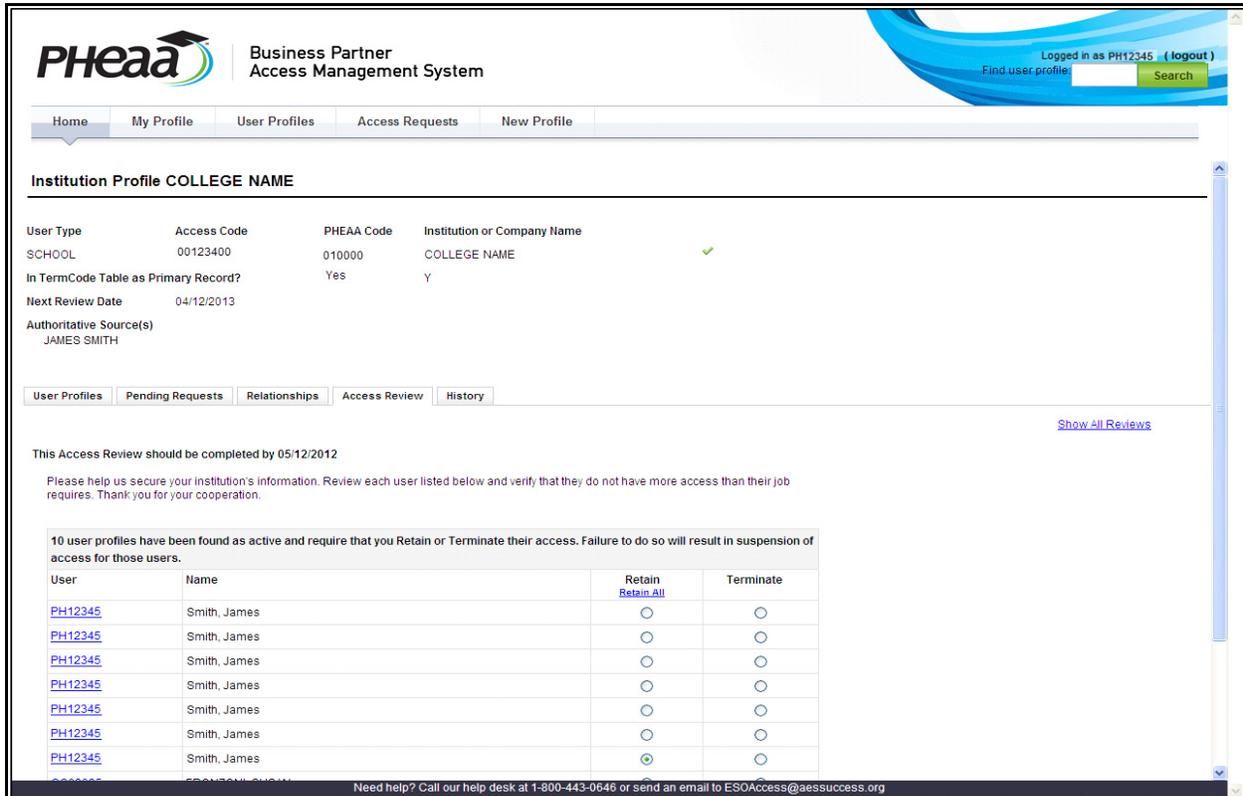
The **Due Date** field displays the date by which the Authoritative Source must complete the review. If the review is not completed by the date in this field, access is suspended for all users on this list. If no action is taken after 365 days, access is terminated.

The **Suspended, Pending, Retained, Reinstated** and **Terminated** fields displays the number of users for whom the action was taken.

1. Click **View Detail** to go to the **Institution Profile**.

The **Institution Profile** page displays for the selected institution.

The **Access Review** tab displays when the institution profile is accessed for a User Access Review. It displays a list of users for whom an access review is due. Users added during the User Access Review period will not display here.



The screenshot shows the BPAMS interface. At the top, there is a navigation bar with tabs: Home, My Profile, User Profiles, Access Requests, and New Profile. The 'Access Requests' tab is selected. Below the navigation bar, the page title is 'Institution Profile COLLEGE NAME'. The main content area displays user profile information:

User Type	Access Code	PHEAA Code	Institution or Company Name
SCHOOL	00123400	010000	COLLEGE NAME
In TermCode Table as Primary Record?		Yes	Y
Next Review Date		04/12/2013	
Authoritative Source(s) JAMES SMITH			

Below the profile information, there are tabs for 'User Profiles', 'Pending Requests', 'Relationships', 'Access Review', and 'History'. The 'Access Review' tab is selected. A message states: 'This Access Review should be completed by 05/12/2012'. Below this, a table lists users for review:

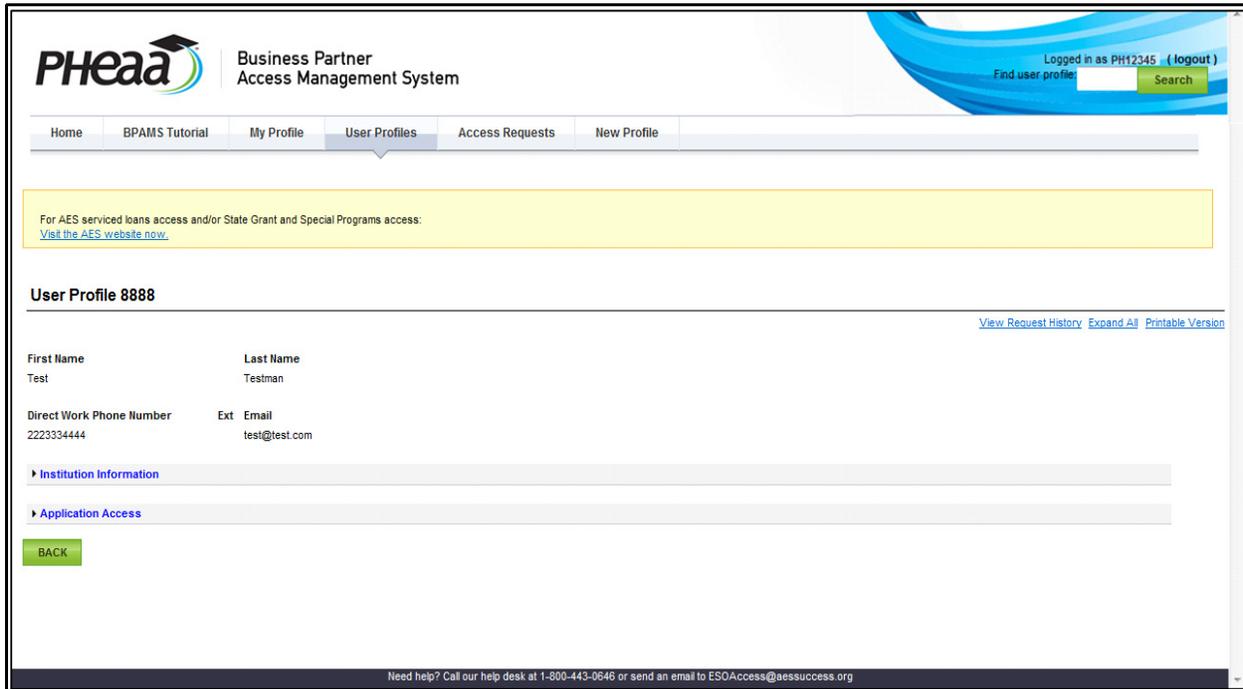
User	Name	Retain	Terminate
PH12345	Smith, James	<input type="radio"/>	<input type="radio"/>
PH12345	Smith, James	<input type="radio"/>	<input type="radio"/>
PH12345	Smith, James	<input type="radio"/>	<input type="radio"/>
PH12345	Smith, James	<input type="radio"/>	<input type="radio"/>
PH12345	Smith, James	<input type="radio"/>	<input type="radio"/>
PH12345	Smith, James	<input type="radio"/>	<input type="radio"/>
PH12345	Smith, James	<input type="radio"/>	<input type="radio"/>

At the bottom of the page, there is a footer with contact information: 'Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aessuccess.org'.

2. Click the link in the **User** field to view the user's profile.

The user's profile displays in a new browser window.

Use this screen to view the user's access if needed. See [Viewing User Profiles and Access Privileges](#) for step-by-step instructions.



The screenshot shows the PHEAA Business Partner Access Management System interface. At the top left is the PHEAA logo. To its right, the text reads "Business Partner Access Management System". In the top right corner, it says "Logged in as PH12345 (logout)" with a "Find user profile" search box and a "Search" button. Below this is a navigation menu with tabs for "Home", "BPAMS Tutorial", "My Profile", "User Profiles" (which is selected), "Access Requests", and "New Profile". A yellow banner contains the text: "For AES serviced loans access and/or State Grant and Special Programs access: [Visit the AES website now.](#)". The main content area is titled "User Profile 8888" and includes links for "View Request History", "Expand All", and "Printable Version". The user's details are as follows:

First Name	Last Name
Test	Testman

Direct Work Phone Number	Ext	Email
2223334444		test@test.com

Below the details are two expandable sections: "Institution Information" and "Application Access". A green "BACK" button is located at the bottom left. At the very bottom of the page, a footer reads: "Need help? Call our help desk at 1-800-443-0646 or send an email to ESOAccess@aesuccess.org".

3. Click the **X** in the top-right corner of the window to close it.



BPAMS for Requestors, Users and the Authoritative Source

Changes to the User Access Review display in a separate table below the list of outstanding reviews and in the User Access Review summary on the **Home** page. It displays a list of users who were reinstated, retained and terminated.

A notification email is sent to the Enterprise Security Office when a user ID is reinstated or terminated.

American Education Services (AES) was created to guarantee and service a variety of Federal Family Education Loan Program (FFELP) and private student loan products for lending partners throughout the nation. AES is a national leader in providing quality customer service to millions of student loan borrowers through its highly-trained and experienced customer service representatives. For more information, visit aesSuccess.org.

The Pennsylvania Higher Education Assistance Agency (PHEAA) conducts its student loan servicing activities nationally as AES and FedLoan Servicing.

aesSuccess.org

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