



STUDENT LOAN NOTIFICATION TOOL USER GUIDE

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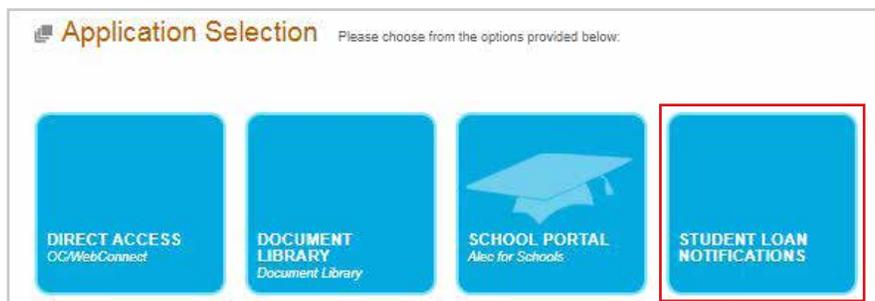
PHEAA'S STUDENT LOAN NOTIFICATION TOOL

PHEAA's Student Loan Notification Tool provides a fast and cost effective way for your institution to comply with the requirements set forth by House Bill 2124, which requires Pennsylvania institutions to provide relevant student loan details to any student enrolled who is a recipient of an education loan at the institution during that academic year. This document provides instructions for using PHEAA's Student Loan Notification Tool to send these annual notifications to students.

ACCESSING THE STUDENT LOAN NOTIFICATION TOOL

Follow these steps to log into the Student Loan Notification Tool using an Internet Browser:

1. Visit aesSuccess.org.
2. Click on PartnerAccess-Alec.
3. Enter your User ID and Password.
4. Select the Student Loan Notification tile.



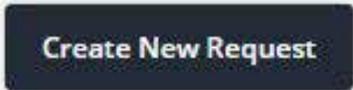
5. When logging into the application for the first time, you will be automatically directed to the Admin Page to set up your Admin information, which includes your institution logo and contact information that will be included in the notifications that are sent to your students. After the Admin initial set up, you will be ready to submit your first notification request. Please see ["Admin Page" on page 10](#) for instructions to complete this set up.

NOTE: When logging in after your Admin Page is completed, you will be directed to the Notifications Page.

CREATING A REQUEST

To submit a request for notifications to be sent to students, follow the steps below:

- From the Notifications Page, select **Create New Request** in the upper right hand corner.

A dark blue rectangular button with the text "Create New Request" in white, bold, sans-serif font.

STEP 1: PROVIDE NOTIFICATION REQUEST INFORMATION

Set Up Notification Request (2019-2020 Academic Year)

Provide Notification Request Information Step 1 of 3

Request Name ?

Type
Email

Loan Data Effective Date ?
mm/dd/yyyy

Delivery Date
mm/dd/yyyy

- 1. Request Name-** This is a free form text field where you can enter a name for your notifications request (example: Year 19-20).
- 2. Type-** This is your preferred method of delivery for the notifications.
 - Email
 - If Email is selected, an email notification will be sent to the students included in your loan data file.
 - View Sample will provide you with a static example of the email that will be delivered to your students.
 - PDF
 - If PDF is selected, a downloadable file of the notifications will be made available in the Student Loan Notification Tool.
 - View Sample will provide you with a static example of the PDF that will be created for each of the students in your loan data file.
- 3. Loan Data Effective Date-** This will be the date on which you downloaded the loan data that will be included in the notification to your students.
 - This date must be the date you are creating the request or earlier (must be a prior or current date).
- 4. Delivery Date-** This is the date that you are requesting the notifications to be processed for delivery to either you (for PDF) or your students (for email).
 - This date must be at least the day after you create your request.
- 5. Select **Save and Continue**.**

STEP 2: PROVIDE LOAN DATA FILE

- 1. Select **Choose File**** to locate your saved completed Loan Data File. For more information regarding the Loan Data File, [see "Appendix A: Loan Data File" on page 14.](#)

- If you need to download the Loan Data Template, a link to the template is provided on this page, as well as on the Admin page.

2. Select **Upload**.

- If there are data errors in the file related to formatting or required fields, an error message will display with the relevant rows and errors. Please correct the errors and re-upload your file.

- If your upload is successful, you will receive a message indicating that your file was successfully uploaded.
 - You will have the option to remove the file and upload a new one if necessary.

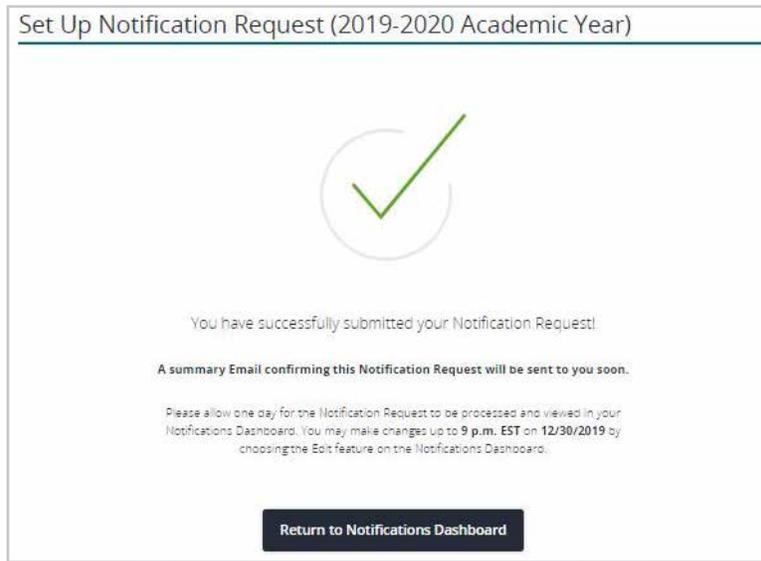
3. Select **Save and Continue**.

STEP 3: NOTIFICATION REQUEST VERIFICATION

1. Review all of the information you submitted for your request. If updates are required, select the **Edit** button. This will return you to Step 1 of your request.

NOTE: The Email Header Information section from your Admin set up will display only if you selected Email as your Type.

2. Select **Submit Request** after you have validated all of your request information.
 - A confirmation will display with information relevant to your request. A summary email will also be sent to the email address attached to your profile listed in the Business Partner Access Management System (BPAMS).



3. Select **Return to Notifications Dashboard** to see your pending request.

PAGES

NOTIFICATIONS PAGE

- **Notifications Page**- Contains information related to all submitted notification requests.

Notifications						2019-2020 Academic Year ▼
Request Name	Total Records	Type	Request Date	Delivery Date	Request Status	
Notification Request 2019	3	Email	12/30/2019	12/31/2019	SCHEDULED	

- This page is filtered by Academic Year. If you have submitted requests for multiple academic years, you will need to update the filter for the appropriate year.

- Request Name
 - When selected, the **Notification Request Summary** is displayed.

Notification Request Summary (2019-2020 Academic Year)

Notification Request Information Edit

Request: Notification Request 2019
Type: Email
Loan Data Effective Date: 12/20/2019
Delivery Date: 12/31/2019

Loan Data File

Loan Data File: LoanDataTemplateDemo.csv

Email Header Information

Sender Name (From): PHEAA University
Subject Line: Your Annual Student Loan Notification!

Cancel Request

- Total Records
 - Total number of records (students) included in the notification request
- Type
 - Email
 - PDF
- Request Date
 - Date on which the request was created.
- Delivery Date
 - The requested date for delivery of the notifications.
- Request Status
 - Scheduled
 - You may edit details related to a scheduled request up to 9PM EST the day before your selected Delivery Date by selecting the **Request Name** and then selecting **Edit** on the Notification Request Summary Page.
 - If the Loan Data File requires updates, you will need to cancel your request and create a new one with the updated data file. To cancel the request, select the **Request Name** and then **Cancel Request** on the Notification Request Summary page.
 - In Process
 - Your request is being processed. Your request will be in the **In Process** status for 5 days for email, and 1 day for PDF.

NOTE: The 5 days allow us to monitor for any undelivered notifications sent by email.

- Action Required

- When a PDF type was requested, the day after the delivery date the status will change to Action Required. When selected, you will be directed to download the PDFs to print and deliver.

Request 1 for 19-20	3	PDF	12/03/2019	12/03/2019	ACTION REQUIRED ^
Your Notification Request is Incomplete! Please Download PDF documents for delivery to the recipients in the Notification Request.					Download PDF

- After you download the PDF, the request will switch to a Complete status; however, you will still have the opportunity to download the PDF at a later time.

Request 1 for 19-20	5	PDF	11/26/2019	11/26/2019	COMPLETE ^
Your Notification Request is complete! All Notifications have been downloaded as PDF documents for your delivery to recipients. Download PDF to download the PDF documents again.					Download PDF

- When an Email type is requested and emails were undelivered due to invalid email addresses or unforeseen bounce backs, the status will change to Action Required. When selected you will have two options to reconcile the failed records.

Request 1 for 19-20	3	Email	12/16/2019	12/24/2019	ACTION REQUIRED ^
Your Notification Request is incomplete! You have 3 Undelivered Emails that still need to be delivered. Two Options are available for you: Export Loan Data to generate a new Loan Data File of the Undelivered Emails OR Download PDF to print and distribute the letters to your students.					Export Loan Data Download PDF

a. Export Loan Data

- When selected, this will give you the option to download a data file in the appropriate format to update the failed email addresses and submit another notification request.
- After the loan data file is downloaded, your request will be considered completed.

b. Download PDF

- When selected, you can download the PDFs for the failed records to print and deliver.

- Complete

- After all actions have been taken, the request will be considered Complete.

Request 1 for 19-20	3	Email	12/16/2019	12/24/2019	COMPLETE ^
Your Notification Request is complete! All 3 Undelivered Email Notifications have been either downloaded as PDF or the loan data was downloaded for you to deliver to recipients.					Export Loan Data Download PDF

ADMIN PAGE

This page contains the administrative set up and contact information to be included in notifications.

- **Institution Logo**- The Institution Logo will be displayed in the notifications to your students along with the alternate text you provide. The alternate text is what will be read when assistive technology is used.

Institution Logo Edit

Logo Image:  Logo Alt Text: PHEAA Logo

- To update your Logo Image or Alternate Text, select **Edit**.
 - Choose file and locate your image file.

Edit Institution Logo

Your institutional logo will be included in the content of the Student Loan Notification.

Logo Image



Reset PHEAAColorLogoDemo.jpg

Logo must be in .jpg or .png format, cannot be larger than 100K in file size and should be no larger than 250 pixels in width and 100 pixels in height.

Logo Alt Text

PHEAA Logo

Logo Alt Text is a short description of a logo image that is used for accessibility compliance.

Save

NOTE: The Logo Image must be in .jpg or .png format, cannot be larger than 100K in file size and should be no larger than 250 pixels in width and 100 pixels in height.

- Logo Alt Text
 - Enter the text in the **Logo Alt Text** box.
- Select Save.
 - Your logo and alt text will be updated for the next Notification Request.

- **Notification Contact Information**- The Notification Contact Information will display in the notifications sent to your students to provide information for them to contact your institution should they have any questions regarding the data included in their notification. Some of these fields are optional for you to include at your discretion.

- Institution Name
 - Department Name (This is an optional field)
 - Phone Number
 - The phone number must be entered in the following format (###) ###-####.
 - Extension (This is an optional field)
 - Contact Name (This is an optional field)
 - Email Address (Reply To)
- Email Header Information

- Sender Name (From)
 - This field defaults to the Institution Name entered above and is the friendly name that will be presented in the (From) section of the Notification. This may be updated as necessary if you wish for this to be different than the Institution Name that will be included in the contact content of the notification.
- Subject Line
 - This field defaults to “Your Annual Student Loan Notification” but can be updated at your discretion to a subject of your choice.

- Loan Data File Template

Loan Data File Template
Download

Student Loan Notification Data Template: Student Loan Notification.csv

- The Loan Data File Template was created to ensure the accuracy and processing capability of the data you provide through the Student Loan Notification tool for your notifications to be successfully delivered to you and/or your students. The template can be downloaded from the Admin page by selecting the **Download** button, or when creating a new request. For more information about how to use the Loan Data File Template, please see ["Appendix A: Loan Data File" on page 14](#).

RECORDS PAGE

The Records Page contains student-level notification data. At any time you can use the Student ID or Last Name search box in the upper left-hand corner of your screen to search for a particular student and the results will be displayed on the Records Page.

- This page displays all student records from all notification Requests in the current academic year by default.

3 Records Total						Export Full Report
Name/Student ID	School Code	Email Address	Type	Delivery Status	Delivery Date	
JOHNSON, HAZLETON ST-ONLY-PRV-2222	00215700 00215704	hazletonjohnson@pheaa.org	Email	Undelivered	01/15/2020	
MOORE, LANCASTER ST-ONLY-FED-1111	00215700	lancastermoore@pheaa.org	Email	Undelivered	01/15/2020	
DAVIS, CARLISLE ST-FED-PRV-3333	00215701	carlisedavis@pheaa.org	Email	Undelivered	01/15/2020	

- When a student name is selected, additional details are displayed to view the data related to the request and the data that was included in the notification sent to the student

[← BACK TO RECORDS](#)

HAZLETON JOHNSON

Student ID: **ST-ONLY-PRV-2222**

School Code: **00215700**
00215704

Email: **hazletonjohnson@pheaa.org**

Notification Information

Academic Year: **2019-2020**

Request Name: **Request 123**

Type: **EMAIL**

Delivery Status: **Undelivered**

Delivery Date: **2020-01-15**

Loan Information

Federal Loan Balance: -

Federal Loan Interest Rate: -

Federal Loan Monthly Amount: -

Federal Loan Payoff Amount: -

Private Loan Balance: **\$6,666.66**

Private Loan Interest Rate: **8%**

Private Loan Monthly Amount: **\$80.88**

Private Loan Payoff Amount: **\$9,705.60**

- Use the filters to narrow the results displayed

Records 2019-2020 Academic Year ▾

Filters HIDE ^

Request Name	School Code	Type	Delivery Status	Delivery Date From	To
All Requests ▾	All Schools ▾	All Types ▾	All Statuses ▾	<input type="text"/> <small>mm/dd/yyyy</small>	<input type="text"/> <small>mm/dd/yyyy</small>

- When you make filter selections, select **Apply Filters** and the results will adjust according to your selections.
- To remove filters, select **Reset Filters** and the results will return to all student records for the current academic year.
- To export records data for a particular academic year or subset of an academic year, apply any filters and select the Export Full Report button. This will provide an Excel spreadsheet with all student data included for the selected population.

APPENDIX A: LOAN DATA FILE

1. Provide the student's information for each student loan.
 - a. Provide the student's ID at your school. Make sure it is a unique value for each unique student and avoid using Social Security Numbers.
 - b. Provide the student's first name and last name.
 - c. Provide the student's email address if making a request to email the notifications.
2. Provide one row of data per student loan. If a student has multiple student loans, provide one row of data per each student loan for that student with the student's information provided on every row.
3. Provide dollar amounts in currency format. Any loans with a negative loan amount will be omitted from the notification.
4. Provide interest rates as a number between 0.000 and 100.000.
5. If the student loan is a federal student loan, provide both the federal loan amount and interest rate values on that row. If the student loan is a non-federal student loan, provide the non-federal loan amount value on that row. Each row must provide either federal student loan data or non-federal student loan data, never both.
6. Provide the school's department of education (DOE) code for which the student loan was taken (optional).

FIELD	FORMATS	RULES
Student id	20-characters	<ul style="list-style-type: none"> Must be populated. Avoid using Social Security Numbers Allows uppercase and lowercase letters, numbers, and this special character: -
First Name	30-characters	<ul style="list-style-type: none"> Must be populated. Allows uppercase and lowercase letters and these special characters: , . ' ` -
Last Name	30-characters	<ul style="list-style-type: none"> Must be populated. Allows uppercase and lowercase letters and these special characters: , . ' ` -
Email Address	250-characters	<ul style="list-style-type: none"> Must be populated if email is desired. Must contain exactly one at-sign with leading and trailing characters. Allows uppercase and lowercase letters and these special characters before the @ sign: . ! # \$ % & ' * + / = ? ^ _ ` { } ~ - Must contain at least one period after the @ sign. Must end with uppercase or lowercase letters, at least two but no more than seven. Cannot begin with a period or a hyphen. Cannot contain two consecutive periods or more than one apostrophe before the @ sign.
Federal Loan Amount	999999.99 \$9,999.99-\$9.99	<ul style="list-style-type: none"> Must be populated for a federal student loan. Must contain exactly one decimal point with leading and trailing digits. Allows \$, hyphen, and commas.
Federal Loan Interest Rate	99.999 9.9%	<ul style="list-style-type: none"> Must be populated for a federal student loan. Must contain exactly one decimal point with leading and trailing digits. Allows % sign.
Non-Federal Loan Amount	999999.99 \$9,999.99-\$9.99	<ul style="list-style-type: none"> Must be populated for a federal student loan. Must contain exactly one decimal point with leading and trailing digits. Allows \$, hyphen, and commas.
School DOE Code	8-characters	<ul style="list-style-type: none"> Optional Allows numbers, will be padded with leading zeros if less than 8-digits.

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

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

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

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