

STATE GRANT PROGRAM

PARTNER INTERFACE DISPLAY OVERVIEW



This document provides a summary of the main features of *Partner Interface*. Please refer to the *Partner Interface User Guides* for greater detail.

GENERAL INFORMATION	
Dashboard	Provides standard lists from which you can filter and export student record worklists for the State Grant, Ready to Succeed Scholarship (RTSS), and State Grant Distance Education Pilot (SGDEPP) Programs. From the Dashboard, you can review recent updates, process records individually, and select students to add to mass update queues.
Student Record	Access each student's record via the "Search Grants" drop-down or through lists accessible via the State Grant Dashboard.
INDIVIDUAL STUDENT - TABBED INFORMATION	
Award Information	Displays term information including, but not limited to: student demographics, eligibility, record status, special review messages, and enrollment data.
School Notes	Allows you to add unofficial notes to a student record and view notes made by others at your institution. These notes are not viewable by other institutions and are not readily viewable to PHEAA staff.
Activity Log	Displays comments made by PHEAA staff and all incoming and outgoing correspondence between PHEAA and the student such as emails, letters, and telephone calls.
Application Info	Displays the most recent application information received from the FAFSA®, <i>State Grant Form (SGF)</i> , or <i>Status Notice</i> . When information is incomplete, a red dot appears and the missing information is highlighted.
INDIVIDUAL STUDENT - LINKED INFORMATION	
Eligibility Summary	Provides current and prior-year historical eligibility and award counter information when the school is the primary choice in the State Grant record for which eligibility has been determined. RTSS information is provided when applicable.
Request Primary School Change	Accessible via the home page link or State Grants drop-down, this is a request to change enrollment to your institution for one or more terms. When submitting this request prior to the start of the term and/or the student's actual enrollment with your school, you are verifying that a statement from the student authorizing the enrollment change is on file. Once submitted, the request will be logged on activity and routed to PHEAA staff for action.
INDIVIDUAL STUDENT - BUTTON OPTIONS	
Special Request	Allows for change requests, in a free-form text format, that cannot be submitted via other update options. Special requests are reserved as a last resort option and should not be used in lieu of email. Once submitted, the request will be logged on activity and routed to PHEAA staff for action.
INDIVIDUAL STUDENT - DROP-DOWN UPDATE OPTIONS	
Update Record	Allows for updates to student information including: demographics, enrollment status, and attempted credits reporting information.
Cancel or Reinstate	Provides the ability to cancel (or reinstate cancellations) when the student is not enrolled or has graduated and earned a bachelor's degree. This function also allows for the rejection (or reinstatement) of an award due to unsatisfactory academic progress.
Cost Override	Provides the ability to report costs that are more than 25% lower* than the PHEAA-approved institutional costs. Since thresholds display, enrollment changes (full-time to part-time, etc.) should be made prior to updating individual costs. *Costs that are more than 25% higher may be reported via "Special Request."
Award Adjustment	Provides the ability to report a revised award amount due to a student's withdrawal for a term. *Gift aid adjustments are not valid as the gift-aid policy was eliminated effective with the 2013-14 Award Year.
Distance Education	Allows for updates to SGDEPP-related information including nominations, award certification, and required student-level data reporting.
Ready to Succeed	Allows for updates to RTSS-related information including nomination-related reporting, award certification, and exclusions for ineligible students.

STUDENT MESSAGING

An informational box may appear directly above the tabbed information depending upon the status of the record. When a message displays, please check the Activity Log tab for more information. Label definitions:

Update Error – Invalid data was entered into the record and PHEAA staff must correct. You may wish to contact PHEAA to check the status of the correction.

Under Review For – There is a hold or ‘PHEAA Correctable’ on the student’s record and PHEAA staff is reviewing.

Special Edits – The student was or will be selected for a review and automatically sent a letter.

Special Messages – Important information such as PHEAA Collectables or status in an Income Validation review.

LABEL	CLICK THE TOGGLE ARROW TO SEE THE POSSIBLE MESSAGES:
Update Error	Data Entry Error to be corrected by PHEAA
Under Review For	5 Year Bona Fide Program
	Class/Academic Level
	Coop Program
	Crime Status
	Default Requirements
	Financial Independence Status
	High School Graduate Requirement
	Interest and Dividend Review
	Maximum Number of State Grant Awards
	PA 529 Plan Amount
	Parents’ Marital Status
	Pennsylvania Domicile Requirement
	PHEAA Collectable
	PHEAA Staff Review in Progress – See Activity
	Program of Study
	Refer to Activity
	Reported Number Enrolled in College
	Reported Student Date of Legal Residence
	Simplified Need/High Asset Review
	Social Security Number
	Veteran Status
	Who the Student Lives With
Special Edits	Domicile
	Veteran Status
	Crime Approval Status
Special Messages	Pending October Verification
	Current Year Offset – Award Adj \$*
	Current Yr Collectable Amt \$*
	Estimated Income
	Less Than 50% Refer to Report
	PHEAA Collectable – See Refund Ltr/Activity
	PHEAA Validation – Under Review
	POW/MIA
	Prior Year Collectable Amt \$*
	Prior Yr Offset- Award Adj \$*
	Validation Complete
	Validation/Review of Estimated Income

*These messages refer to ‘PHEAA Collectables’ which are instances where PHEAA is recovering an overaward directly from the student. Specific amounts applicable to the student will display.