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Introduction

The Grants Partner Interface is a Web portal that allows school users to manage Pennsylvania State grant student records on the Web. School users can search for, view, and update individual student records; view eligibility records; submit special requests when changes cannot be made on the portal; request primary school changes; certify rosters; use mass update queues to update multiple student records; access and export student listings through a state grant dashboard; and maintain the school profile information.

For information about using the Grants Partner Interface for the Ready to Succeed Scholarship (RTSS) program, refer to the user guide School Portal Ready-to-Succeed Scholarship Partner Interface. For information about using the Grants Partner Interface for the Distance Education Pilot Program for years 2017-18 and prior, refer to the user guide School Portal Distance Education Partner Interface.

Getting Started

Use the following URL to access this application: https://am.partners.aessuccess.org/partnersB2Bsso/login.htm. Refer to the Web Login and Authentication user guide for additional instructions on logging in to the application, managing your personal profile and security information, and resetting your password.
Alec School Portal

The Alec School Portal home page displays after logging into the application.

To search for student records, refer to the Search Student Records section of this guide.

The State Grants section displays links to view or process additional State Grant data. These options are also available from the State Grants drop-down arrow below the School Portal logo:
- **View State Grants Dashboard**: Refer to the View the State Grants Dashboard section.
- **View My Exports**: Refer to the View My Exports section for information about viewing exported lists and reports.
- **Create Mass Update Queues**: Refer to the Mass Update Queues section for information about creating and maintaining mass update queues.
- **View Weekly Disbursement Roster**: Refer to the PageCenter user guide for information about downloading weekly disbursement rosters. Refer to the Rosters & Disbursements section of this document for other roster and disbursement information for State Grants.
• **State Grant Education Costs**: Refer to the *State Grant Education Cost Form* user guide for more information about managing State Grant Education Costs.

• **State Grant Disbursement Certification**:

• **Request Primary School Change**: Refer to the [Request Primary School Change](#) section of this guide for more information about updating a student’s primary school.

• **View School Profile**: Refer to the [View School Profile](#) section of this guide to update school demographics and contact information and view the activity log for the school.
Search Student Records

Search fields at the top of the School Portal home page allow school users to search for grants or loans.

1. To manage Pennsylvania State Grant student records, click the down arrow in the first search field and click **Search Grants**.

   **NOTE:** The drop down list does not display for school users with access only to State Grant information. In this case, only **Search Grants** displays.

2. In the second search field, enter the student’s nine-digit Social Security number, 10-digit PHEAA account number, or last name. To use a wildcard search, enter the first three characters of the student’s last name followed by an asterisk (*).

3. Click the **Search** button.
The **Search Results** page displays a list of accounts that match the criteria entered in the search field. This screen displays only if the school user searched by last name and more than one student exists with that name.

**NOTE:** Students display for all periods. To filter student records by academic year, click the down arrow and select the academic year.

4. To view a student’s account, click the **View Account** link in the **Action** field.
The **Student Record** page displays. This page displays when a user selects a student from the search results or searches for a student by account ID or SSN.

**NOTE:** Information for the most recent academic year is not displayed until PHEAA is ready to release estimated eligibility to school users. Generally, this occurs in November.
**View Student Records**

The **Student Record** displays student, school and grant information for the academic year selected. School users may view students for which their school is listed as the primary on the Free Application for Federal Student Aid (FAFSA). For academic years prior to 2016-17, school users may view students for which their school is listed as the secondary in choices 2 through 10.
1. To view a different student record, enter an SSN or other search criteria in the search field and click the **Search** icon, or click the **Back to Search Results** link to return to the search results listing to select another student.

The following information displays at the top of the student record.

The **State Grant Information** field displays the eight-digit federal school code assigned by the Department of Education and the two-character suffix assigned by PHEAA, followed by the school’s name.

The **Student Record** field displays the name of the student.

The **Prior Name(s)** field displays the student’s prior names.

The **SSN** field displays the student’s nine-digit Social Security number.

The **ACCT#** field displays the student’s 10-digit account number.

The **SG Award Counter (Grand Total)** field displays the total number of terms for all years for which the student has received a State Grant award.

2. To view the student’s eligibility record, click the **VIEW ELIGIBILITY FOR STUDENT** link. See **View Eligibility Record** for more information.

3. Click the down arrow for **Select Action** and select **Update Record**, **Cancel or Reinstate**, **Cost Override** or **Award Adjustment** from the drop-down list. See **Update Student Record** for step-by-step instructions.

4. To submit a special request, click the **Special Request** button. See **Submit Special Request** for step-by-step instructions.

5. To sort a student’s records by academic year, click the down arrow and select the academic year.

   **NOTE:** If the most recent record for the student is prior to the 2007-08 academic year, the school user will be delivered directly to the student’s Eligibility Record.

The following State Grant record fields display for the year and period this is selected in the drop-down list.

The **Record Status** field displays **Complete**, **Incomplete**, **Not Screened** or **This is an Inactive Record** to indicate the status of the record.
The **Last Update** field displays the date the student’s record was last updated.

The **School Status** field displays **Primary** if the student has listed the school as his or her first choice in any term. For academic years prior to 2016-17, **Secondary** displays if the student listed the school as choice 2 through 10 on the FAFSA.

**NOTE:** A Help icon displays to the right of the field. Click the icon to display additional information about the school status.

The **Dependency Status** field displays **Dependent, Financially Independent** or **Veteran**, indicating the student’s dependency status.

The **Last User** field displays the ID of the user or program that last updated the student’s State Grant record.

The **Received Date** field displays the State Grant filing date, which is the date the FAFSA was received.

The **State Grant Eligibility** field displays the student’s State Grant award amount for the Fall, Winter and Spring terms.

An informational box, not shown, may display above the tabs depending on the status of the State Grant record. The following informational messages may display:

- **Update Error** displays when there is a data entry error in the State Grant record. Click the arrow to expand the box and display the message that these errors must be corrected by PHEAA.
- **Under Review For** displays where there is a PHEAA-correctable hold in the State Grant record. Click the arrow to expand the box and display the specific reasons why the record is under review, such as **Financial Independence Status** or **Interest and Dividend Review**.
- **Special Edit** displays when the State Grant record has had an automated letter sent to the student. Click the arrow to expand the box and display the review reason, such as **Domicile, Veteran Status** or **Crime**.
- **Special Messages** displays important information regarding the status of the student’s record. Click the arrow to expand the box and display messages such as **PHEAA Collectable information or Income Validation review** status.

Additional student and grant information displays on the following tabs.

- **Award Variations**
- **Award Information**
- **School Notes**
- **Activity Log**
• Application Info

**NOTE:** The Award Variations tab only displays if the Distance Education award adjustment factor is being applied for the academic year or summer session selected.

**NOTE:** School users can print the Student Record and the selected tab on one page. On the Web browser, select File then Print Preview. Reduce the print size to 60%—or 50% for the Application Info tab—then select Print.

**NOTE:** The Ready to Succeed tab also displays for the student if the school is participating in the Ready to Succeed Scholarship program and the student record for the RTSS program has been updated by the school to disqualify the record, add the Grade Point Average (GPA) or add the academic level. Refer to the user guide School Portal Ready-to-Succeed Scholarship Partner Interface for more information.
The Award Variations tab displays if the Distance Education award adjustment factor is being applied for the academic year or summer session selected.

The Award Variations tab displays the Enrollment Mode Award/Reject amounts for Fall, Winter and Spring and the Academic Year Total.
Award Information

The **Award Information** tab displays student and grant information in two sections: **Student Information** and **Grant Information**. The information that displays is the same for the regular academic award and for the summer award; however, the summer award information displays on a separate record.

**NOTE:** This section displays what is available to the primary school user. Refer to **Award Information – Secondary School (2-10 College Choice)** in Appendix C for more information about what is available to the secondary school choice user for academic years prior to 2016-17. Refer to **Grant Information for Years Prior to 2018-19** in Appendix C for a description of the **Award Information** tab for prior years.
The **Student Information** section displays information about the student for the most recent academic year application on file or the selected academic year if a different one was selected.

The **Address** field displays the student’s home address.

The **Phone** field displays the student’s home telephone number.

The **Email** field displays the student’s email address.

The **H.S. Graduation** field displays the year the student graduated from high school.

The **Grant Information** section displays information about the student’s grant for each term and the total for the most recent academic year or the selected academic year if a different one was selected.

The **School Name (OE Code)** field displays the eight-digit federal school code assigned by the Department of Education and the two-character suffix assigned by PHEAA, followed by the school’s name.

The **Program of Study** field displays the student’s program of study.

The **Award Date** field displays the date the State Grant was awarded.

The **Housing Status** field displays the student’s housing status.

The **Enrollment Status** field displays the student’s enrollment status.

The **Enrollment Mode** field displays the student’s percentage of classroom or distance education instruction.

The **Award/Reject** field displays the award amount for each term and the total for the academic year, if applicable. A reject reason displays if no award was granted. For the newest academic year, from approximately November through late April, *(EST)* displays after the award amount to indicate estimated eligibility for the primary school.

The **Alternate Award (AA)** field displays the student’s award amount if enrollment was changed. If the enrollment is full-time, this field displays part-time award amount and vice versa. This field remains blank if there is a reject or if the award amount cannot be calculated. For example, if the Alternate Award results in no financial need when the student is part-time due to minimum allowable awards, this field remains blank.

The **Enrollment Status for AA** field displays the enrollment status for the **Alternate Award** field.
The **Remedial Exception** field displays an academic year award counter total of terms where a remedial exception was applied.

The **Award Counters** field displays the decimal equivalent of the State Grant award for the term. For example, a part-time semester award equals 0.25; a part-time quarter award equals 0.16 or 0.17.

The **Award Type** field displays **Adjusted** if the award was adjusted or **Cancellation** if the award was canceled. Otherwise, it displays **Processed**.

The **Cancellation Reason** field displays the reason the award was canceled.

The **School Adjustment Reason** field displays **Student Withdrawal from Institution** or **Award Adjusted due to Other Gift Aid**, indicating the reason the school adjusted the award.

The **PHEAA Adjustment Reason** field displays **Award Adjusted due to Collection Case** if there is a PHEAA Collectable. If the reason was due to a 5 Year Co-op Program, **Award Adjusted due to 5th Yr in Co-op Program** displays. Otherwise, **Staff Input** displays if PHEAA adjusted the award for another reason.

The **Academic Level** field displays the student’s year in school.

The **Total College Cost** field displays the total PHEAA-approved college costs for each term and the total for the academic year.

The **PHEAA Estimated Pell** field displays the student’s estimated PHEAA Pell award for each term and the total for the academic year.

The **PHEAA EFC** field displays the student’s Expected Family Contribution for each term and the total for the academic year as calculated by PHEAA.

**NOTE:** To print the Student Record and the Award Information tab on one page, click **File** then **Print Preview** on the Web browser. Reduce the print size to 60% then select **Print**.
School Notes

The **School Notes** tab displays a history of comments added by the school. These comments are entered by the school for informational purposes only. Comments are intended for internal use by the school, are not visible to other schools, and are not readily viewable to PHEAA staff.

<table>
<thead>
<tr>
<th>User Name/ID</th>
<th>Period</th>
<th>Comment Date</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST TESTUSERH</td>
<td>2013-14</td>
<td>11/01/2013</td>
<td>This is a test.</td>
</tr>
<tr>
<td>TEST TESTUSERH</td>
<td>2013-14</td>
<td>11/01/2013</td>
<td>Review note once PHEAA returns call.</td>
</tr>
<tr>
<td>TEST TESTUSERH</td>
<td>2013-14</td>
<td>11/01/2013</td>
<td>Need to call this student.</td>
</tr>
</tbody>
</table>

The **User Name/ID** field displays the name and ID of the user who added the comment.

The **Period** field displays the academic year or summer term for which the comment was added.

The **Comment Date** field display the date the comment was added.

The **Comment** field displays the comment entered by the school user for informational purposes.

1. To display notes for all academic years, check **Display Notes for All Years**.

2. To view additional comments if more than 15 comments exist, click the down arrow in the **Page** field, not shown, and select a page number from the drop-down list, or click the left and right arrows, not shown, to scroll through the pages.

3. To add a note, click the **Add Another Note** link.

**NOTE:** To print the Student Record and the School Notes tab on one page, click **File** then **Print Preview** on the Web browser. Reduce the print size to 60% then select **Print**.
The **School Notes** comment box displays to add another note. It indicates the academic year for which the comment will be added. The academic year was selected when the user selected the record to view.

4. Enter a comment in the **School Notes** text box.

5. Click the **Submit** button to submit the comment, or click the **Cancel** button to close the **School Notes** box without saving the comment.
Activity Log

The **Activity Log** tab displays all activity and correspondence that occurs on the account. It cannot be updated by the school user.

The **Activity Type** field displays the type of activity or correspondence that occurred on the account, such as email or telephone call.

The **Period** field displays the academic year or summer term for which the activity was added.

The **Description** field displays a description of the activity.

The **Activity Date** field displays the date the activity occurred on the account.

The **Close Date** field displays the date the activity was closed or resolved. If the field is blank, the request for action is still pending.

The **Contact Description** field displays the person to whom the activity was directed.

The **User** field displays the name of the user who logged the activity.

1. To view additional activity records if more than 15 activities exist, click the down arrow in the **Page** field, not shown, and select a page number from the drop-down list, or click the left and right arrows, not shown, to scroll through the pages.

2. To display activity for all years, check **Display Activity for All Years**.

3. If additional activity comments are available, an arrow will display to the left of the activity. Click the arrow to expand or collapse activity records.
NOTE: To print the Student Record and the Activity Log on one page, click File then Print Preview on the Web browser. Reduce the print size to 60% then select Print.
Application Info

The **Application Info** tab displays the application information which correlates to the Status Notice Items displayed on pages 2 through 4 of the State Grant record and to all questions asked on a paper Status Notice. Some of this information may be populated from the FAFSA or State Grant Form (SGF). If the application is incomplete, a red dot displays on the **Application Info** tab and the following message displays: **Information is incomplete. Required fields are highlighted below.** Otherwise, the following message displays: **The information displayed is the most recent information entered in the Status Notice Application.**
The following demographic and academic information is populated in the Student and Parent(s) columns if the student is a dependent student. If the student is independent or a veteran, only the Student column is populated.

The **Date of Birth** field displays the student’s date of birth.

The **State of Legal Residence** field displays the student’s state of legal residence. The parent’s information displays in the Parents column if the student is a dependent.

The **Residency Established** field displays the date the student’s residency was established. The parent’s information displays in the Parents column if the student is a dependent.

The **Current Marital Status** field displays the student’s marital status. The parent’s information displays in the Parents column if the student is a dependent.

The **Bachelor’s Degree Before 7/1 of Application Year** field displays Yes or No, indicating whether the student has received a bachelor’s degree before July 1 of the application year.

The **High School Diploma or GED Date** field displays the date the student received his or her high school diploma or GED.

The **High School State or GED** field displays the location of the high school from which the student received his or her diploma. GED displays instead of the high school location if the student received a General Equivalency Diploma.

The **Veteran of the U.S. Armed Forces** field displays Yes or No, indicating whether the student is a veteran of the U.S. armed forces.

The **Month/Year of Discharge** field displays the month and year the student was discharged from the U.S. armed forces.

The **Number of Family Members** field displays the number of family members in the student’s household. The parent’s information displays in the Parents column if the student is a dependent.

The **Number of College Students** field displays the number of college students in the student’s household. The parent’s information displays in the Parents column if the student is a dependent.

The following financial information is populated in the Student and Parent(s) columns if the student is a dependent student. If the student is independent or a veteran, only the Student column is populated.
The **Tax Return Filed** field displays the status of the tax return.

The **Type of Tax Return** field displays the IRS’ tax return form number.

The **Total Number of Exemptions** field displays the total number of exemptions from the tax return.

The **Adjusted Gross Income** field displays the adjusted gross income from the tax return.

The **Income of Student/Father/Parent 1** field displays the income for the student in the **Student** column and the income for the student’s father or parent 1 in the **Parent** column if the student is a dependent.

The **Income of Spouse/Mother/Parent 2** field displays the income for the student’s spouse in the **Student** column and the income for the student’s mother or parent 2 in the **Parent** column if the student is a dependent.

The **Income Tax Paid** field displays the amount of income tax paid.

The **Investment Net Worth** field displays the new worth of investments.

The **PA Treasury 529 College Savings Program** field displays the Pennsylvania Treasury 529 College Savings Program value which was included in the **Investment Net Worth** field.

The **Business Farm Net Worth** field displays the net worth of a business farm.

The **Cash/Savings/Checking** field displays the balance of cash, savings and checking accounts.

The **Student Resides With** field indicates with whom the student resides.

The **Employment Status of Father/Stepparent/Parent 1** field displays the employment status of the father, stepparent, or parent 1.

The **Employment Status of Mother/Stepparent/Parent 2** field displays the employment status of the mother, stepparent, or parent 2.

The **Student’s Employment Status** field displays the student’s employment status.

The **Spouse’s Employment Status** field displays the spouse’s employment status.

The **SSN of Father/Stepparent/Parent 1** field displays the nine-digit Social Security number of the father, stepparent, or parent 1.
The **SSN of Mother/Stepparent/Parent 2** field displays the nine-digit Social Security number of the mother, stepparent, or parent 2.

The **Spouse’s SSN** field displays the spouse’s nine-digit Social Security Number.

The **School Attending (First Choice), Student’s Housing Status, Student’s Enrollment Status, Student’s Year in School, and the Student’s Program of Study** fields display the student’s school information. The information is initially populated for the full year based upon the application submission but is subject to change on a term-by-term basis at the request of the student or school. These fields display **Refer to Award Info Tab** since they are stored at an academic term and period level rather than a student and parent level. See **Award Information** and **Award Information – Secondary School (2-10 College Choice)** for more information.

The **Signature** field indicates who provided a signature.

**NOTE:** To print the Student Record and the Application Info tab on one page, click File then Print Preview on the Web browser. Reduce the print size to 50% then select Print.
1. To view the student’s eligibility record, click the **VIEW ELIGIBILITY FOR STUDENT** link on the student record.
The **Eligibility Summary** page displays.

**NOTE:** For examples of screens for academic year 2014-15 and prior years, refer to the [Eligibility Summary for Years 2014 and Prior](#) section in Appendix C.

![Image of Eligibility Summary page](image)

The **Eligibility Summary** displays a history of the student’s State Grant applications, award counters, remedial term and other eligibility information. It displays eligibility information for each term and for the academic year.

2. To view a different student record, enter an SSN or other search criteria in the search field and click the **Search** icon, or click the **Back to Search Results** link to return to the search results listing to select another student.
The **Eligibility Summary** field displays the student’s name.

3. To return to the student record, the **VIEW STUDENT RECORD** link.

The **SSN** field displays the student’s nine-digit Social Security number.

The **ACCT#** field displays the student’s 10-digit account number.

The **SG Award Counter** (Grand Total) field displays the total of all State Grant award counters that the student has received for all years.

The **Last Update** field displays the date the student’s eligibility record was last updated.

The **Last User** field displays the ID of the user who last updated the student’s eligibility record.

4. Click the left and right arrows to scroll through the eligibility records.

The **Term Records** section displays information for the fall, winter, spring and summer terms and the academic year total, if appropriate.

The **Halftime** field displays **Yes** or **No**, indicating whether the student attendance was half-time.

The **School Name (OE Code)** field displays the eight-digit federal school code assigned by the Department of Education and the two-character suffix assigned by PHEAA, followed by the school’s name.

The **Program of Study** field displays the student’s program of study.

The **SG Award/Reject** field displays the award amount or a reject reason for each term, including the summer, and a total for the academic year.

The **SG Remedial Exception** field displays the award counter for the terms during which the student took developmental credits needed to meet the State Grant minimum enrollment requirement.

The **SG Award Counters** field displays the decimal equivalent of the State Grant award for the term and a total for the academic year. For example, a part-time semester award equals .25.

The **RTSS Award/Reject** field displays the Ready to Succeed Scholarship award amount or a reject reason for each term, including the summer, and a total for the academic year.
The **RTSS Remedial Exception** field displays the award counter for the terms during which the student took developmental credits needed to meet the State Grant minimum enrollment requirement.

The **RTSS Counters** field displays the decimal equivalent of the Ready to Succeed Scholarship award for the term and a total for the academic year. For example, a part-time semester award equals .25.

The **SG Academic Level** field displays the student’s year in school for each term.

The **Cancellation Reason** field displays the reason the award was canceled.

The **Adjustment Reason** field displays the reason for the award adjustment.

The **PHEAA EFC** field displays the PHEAA-calculated Expected Family Contribution.

The **High School Graduate** field displays **Yes** or **No**, indicating whether the student met the high school graduate or equivalent requirement.

The **Period Records** section displays information for the academic year and for the summer term, if appropriate.

The **Application Filed** field displays **Yes** or **No**, indicating whether the student filed a FAFSA for the academic year or online summer application for the summer term.

The **Total Family Contribution** field displays the family’s Total Family Contribution used in calculating eligibility under the old need-analysis formula for years prior to 2006-07.

The **RTSS Academic Level** field displays the student’s year in school for each term.

The **High School Grad Year** field displays the year the student graduated from high school.

The **Veteran Status** field displays **Yes** or **No**, indicating whether the student is a veteran.

The **Financial Independent Status** field indicates whether the student is considered independent for State Grant purposes.

The **Inactivation Reason** field displays the reason the State Grant record was inactivated and further processing was discontinued.
Update Student Record

School users can update information on the student record when certifying eligibility for the Pennsylvania State Grant. Only a school user from the student’s primary school may update the student record.

1. Click the down arrow in Select Action and select Update Record, Cancel or Reinstate, Cost Override or Award Adjustment from the drop-down list. See the following sections for more information:
   - Student Record
   - Cancellation or Reinstatement
   - Cost Override
   - Award Adjustments

NOTE: Ready to Succeed displays for approved schools when the student has potential Ready to Succeed eligibility. Distance Education displays for all approved schools for year 2017-18 and prior years. Refer to user guides School Portal Distance Education Partner Interface and School Portal Ready-to-Succeed Scholarship Partner Interface for more information about the Distance Education Pilot Program and Ready to Succeed programs.
The **Student Record** section displays the fields of the student’s demographic, school and credit information sections open for edit. To update student record information for years prior to 2018-19, refer to the [Update the Student Record for Years Prior to 2018-19](#) section in this document.

![Image of Student Record](#)

The **Demographic Information** section displays the student’s demographic information.

1. In the **Address** field, enter the student’s home address. Enter the street address, city and zip code. Click the down arrow to select the state from the drop-down list.

2. In the **Phone** field, enter the student’s 10-digit home telephone number.
3. In the **Email** field, enter the student’s email address.

The **School Information** section displays information about the student’s school for all terms in the selected academic year. When the school on the State Grant record is not the same for each term, the school users are permitted only to submit updates for the term associated with their school. All other terms are protected and cannot be updated by school users.

4. The **Branch Campus** field displays the name of the school where the student is attending. This field is updateable only by authorized users at schools that have multiple campuses. To change the student’s branch campus, click the down arrow and select a branch campus from the drop-down list.

5. Click the down arrow in the **Program of Study** field and select the student’s program of study from the drop-down list.

6. Click the down arrow in the **Housing Status** field and select the student’s housing status from the drop-down list.

7. Click the down arrow in the **Enrollment Status** field and select the student’s enrollment status from the drop-down list.

8. Click the down arrow in the **Academic Level** field and select the student’s academic level from the drop-down list. This field displays for nursing schools only.

9. Click the down arrow in the **Enrollment Mode** field and select the student’s percentage of classroom instruction or distance education.

10. In the **School Notes** field, enter the comments regarding the update, if necessary. Click **View Previous Comments** to view comments entered for previous updates. A pop-up box displays. This field is used by the school for informational purposes only and will not be reviewed by PHEAA staff.

11. Click the **Submit Changes** button to submit the updates made to the **Student Record** section, or click the **Cancel** button to close the **Student Record** section without submitting the updates.
Cancellation or Reinstatement

The **Cancellation or Reinstatement** section displays the fields for award cancellation and reinstatement information open for edit. If the record was previously canceled or rejected, those reasons display under the term.

**NOTE:** This section may be disabled if the latest academic year is not accessible because PHEAA is has not made eligibility announcements to students, which generally occurs in May, or if the record being adjusted does not have an award to cancel or reinstate. For example, the record is in an incomplete status.

1. In the **Cancellation – Student Graduated** field, check each term to which the cancellation should apply if the cancellation is because the student graduated.

2. In the **Cancellation – Not Enrolled** field, check each term to which the cancellation should apply if the cancellation is because the student is not enrolled.

3. In the **Reject – Academic Progress Reject** field, check each term to which the cancellation should apply if the cancellation is due to failure to make satisfactory academic progress for State Grant purposes.
4. In the **Reinstatement** field check the term to which the reinstatement should apply. This field displays only if the term was previously canceled or rejected.

5. In the **School Notes** field, enter comments regarding the update, if necessary. Click **View Previous Comments** to view comments entered for previous updates. A pop-up box displays. This field is used by the school for informational purposes only and will not be reviewed by PHEAA staff.

6. Click the **Submit Changes** button to submit the updates made to the **Cancellation or Reinstatement** section, or click the **Cancel** button to close the **Cancellation or Reinstatement** section without submitting the updates.
Cost Override

The **Cost Override** section displays information that is required to be reported when a student incurs costs that are more than 25% lower than the PHEAA-approved costs. PHEAA-approved costs are those which were used to process all students at the school. If the record had a previous cost override submitted, the term tuition and fees submitted will display next to the amount label.

**NOTE:** This section may be disabled if the latest academic year is not accessible because PHEAA is not ready to accept cost adjustments or if the record being adjusted does not have costs to adjust. For example, the record is in an incomplete status.

1. In the **Amount** field, enter the actual tuition and fees incurred by the student for the term for which the cost is more than 25% lower than those annually reported to PHEAA.

   The **Enrollment Status** field displays the student’s enrollment status for each term.

   **NOTE:** If the student’s enrollment for the term for which the cost override is being applied is incorrect, click **Cancel** to close the **Cost Override** section without submitting the override. Open the **Student Record** section in Edit mode and make the enrollment change. Return to the **Cost Override** section to submit the request.
The **Tuition & Fees** field displays the student’s annualized tuition and fees amount used to calculate eligibility. Annualized tuition is tuition and fees for full-time enrollment for the entire year.

The **Full-Time Threshold** field displays the tuition and fees amount divided by the number of terms (two in most cases), then multiplied by .75.

The **Part-Time Threshold** field displays the tuition and fees amount divided by the number of terms (two in most cases), then multiplied by .75 and divided again by 2.

2. Check **Remove Cost Override** to remove the cost override. This is unprotected only when a cost override has been entered in a previous update.

3. In the **School Notes** field, enter comments regarding the update, if necessary. Click **View Previous Comments** to view comments entered for previous updates. A pop-up box displays. This field is used by the school for informational purposes only and will not be reviewed by PHEAA staff.

4. Click the **Submit Changes** button to submit the updates made to the **Cost Override** section, or click the **Cancel** button to close the **Cost Override** section without submitting the updates.
Award Adjustments

The **Award Adjustments** section displays award adjustment information. If the record was previously adjusted, those reasons will display under the term.

**NOTE:** This section may be disabled if the latest academic year is not accessible because PHEAA is not ready to accept adjustments or if the record being adjusted does not have an award to adjust. For example, the record is in an incomplete status or the term is ineligible.

1. In the **State Grant Adjustment** field, enter the adjusted award amount. Only an amount that is lower than the current amount may be entered.

   **NOTE:** To enter an award that is higher than the current award but lower than the original PHEAA-calculated award, first remove the adjustment. For example, if the Current Award calculated by PHEAA is $1,000 and an adjustment is made to lower the award to $800 when it should have been $850, make two adjustments. First, remove the $800 adjustment, then submit the $850 adjustment.

2. Click the down arrow in the **Select Reason** field and select a reason for the adjustment from the drop-down list.
The **Current State Grant Award** field displays the student’s current State Grant award for each term.

3. Check **Remove Adjustments** to remove the adjustment. This is unprotected only when an adjustment was made for a previous update.

4. In the **School Notes** field, enter comments regarding the update, if necessary. Click **View Previous Comments** to view comments entered for previous updates. A pop-up box displays. This field is used by the school for informational purposes only. This field is used by the school for informational purposes only and will not be reviewed by PHEAA staff.

5. Click the **Submit Changes** button to submit the updates made to the **Award Adjustments** section, or click the **Cancel** button to close the **Award Adjustments** section without submitting the updates.
Submit Special Request

School users can submit special requests to make changes to a student account when the change cannot be made using the Grants Partner Interface. Once submitted, the information entered in the Special Request field is written as an open activity to the student’s activity record. Once the request is reviewed and completed by PHEAA, the activity log is closed.

School users can submit a special request from the Student Record or from the Update Record.

**NOTE:** Special Requests are reserved as a last resort option to request updates and should not be used in lieu of email.

1. To submit a special request, first verify the academic year on the student record or the update record screens. To select a different academic year, click the down arrow and select the academic year.

2. Click **Special Request**.
The **Special Request** page displays.

3. Enter the details about the special request in the comment box.

4. Click the **Submit Request** button to submit the request, or click the **Cancel** button to close the **Special Request** page without submitting the request.
The **Student Record** page redisplay.

**NOTE:** The **Student Record** page displays even if the school user accesses the **Special Request** page from the **Update Record** page.

School users can view the special request on the **Activity Log** tab. Refer to **Activity Log** for more information.
View the State Grants Dashboard

School users can use the **State Grants Dashboard** to access, filter and export student record lists; review recent updates; review disbursement rosters and refunds; certify rosters; process records individually; and select students to add to a mass update queue.

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1. Click **View State Grant Dashboard** on the **Home** page or select it from the **State Grants** drop-down list.
The **State Grants Dashboard** displays.

**NOTE:** The **State Grants Dashboard** is updated in real time.
The **Record Status List** displays at the top of the **State Grants Dashboard**. It displays the total of all records in each status and a summary of the student records that were updated within the previous three weeks, beginning with the current date.

Each status on the **Record Status List** is further broken down by the number of student records that were updated by the school and by PHEAA or the student. **Updates by School** indicates that the record was last updated by a school user. **Updates by PHEAA/Students** indicates that the record was last updated by a PHEAA user or program, or that information was received electronically from a student. The **Total** field displays the total of all records in each status and time period.

2. To view a summary for a different academic year, click the down arrow in the academic year field to select a new academic year to display.

3. To view a summary for a different branch, click the down arrow in the school field to select a new branch.

4. The **Record Status List** is collapsed when the **State Grants Dashboard** displays. Click **SHOW MORE STATUSES** to expand the **Record Status List** to show more statuses.

The following statuses display in the **Record Status List**.

- **Complete – Active** status includes records that have been awarded, cancelled or that are ineligible for the following reasons: **No Need** (M), **Maximum Number of Payments** (Y) and **High EFC** (E).
- **Incomplete – Active** status includes records that are missing information or are under review. This may include reason, **High EFC** (E).
- **Complete – Reject** status includes records that are ineligible for a reason other than financial need for at least one term.
- **Incomplete – Reject** status includes records that are ineligible for a reason other than financial need for at least one term and are missing information or are under review.
- **Complete – Inactive** status includes records that have been declared inactive by PHEAA.
- **Incomplete – Inactive** status includes records that have been declared inactive by PHEAA and information is incomplete.
- **All Statuses** status includes complete and incomplete records for active, reject and inactive statuses.
- **Not Enrolled** status includes the number of non-disbursed records that are marked as not enrolled for all terms at the school. This status displays for records 2020-21 and forward.

5. If one or more records exist for a status and time period, the number of records displays as a link in the **Record Status List**. Click the link in the **Record Status List** and select one of the following options from the drop-down list:
• **View Records List.** Select this option to view the student record details for a status or time period. Refer to the [View the State Grant Records Student List](#) section.

• **Process Records Individually.** Select this option to cycle through student records for a status or time period. Refer to the [View Student Records](#) section. This option is not available for **All Statuses**.

• **Export Records List.** Select this option to export records in a particular status or time period. Refer to the [Export Student Records](#) section.

**NOTE:** The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the Search box at that top of the State Grant Portal.

In addition to the **Record Status List**, the **Process State Grants Mass Update, Rosters & Disbursement** and **Refunds** sections display at the bottom of the **State Grants Dashboard**.

The **Process State Grants Mass Update** section displays a list of saved mass update queues. School users can click the **Create Mass Update** button to create a queue, the **Edit** button to edit the update criteria, the **Process** button to process the queue, or the **Delete** button to delete the queue. Refer to the [Mass Update Queues](#) section for more information.

The **Rosters & Disbursements** section displays the most recent roster information available for the school. Refer to the [Rosters & Disbursements](#) section of this guide for more information on the rosters and certifying rosters.

The **Refunds** section displays the most recent refund information available for the school. Refer to the [Refunds](#) section of this guide for more information.

**NOTE:** If the school is a branch campus and has a central processing school, a message displays that roster and disbursements information and refund information are not available for the branch campus. In this case, the school user would need to log in or select the main campus or central processing school to see the roster, disbursement and refund information.
View the State Grant Records Student List

The State Grant Records Student List displays when a school user selects View Records List in the Record Status List on the State Grants Dashboard. It displays in two panes: an abbreviated summary of the State Grants Dashboard, left; and a list of student records in the selected status, right. Options are available in the Filter Records section to filter and sort the records in the Student List.

NOTE: This section describes the State Grant Record student list for years 2018-19 and forward. To filter the list of records for years prior to 2018-19, refer to the View the State Grant Records Student List for Years Prior to 2018-19 section in this document.
1. To view a summary and a list of student records for the same time period in a different academic year or summer period, click the down arrow in the academic year field to select the academic year to display.

2. To view a summary and a list of student records for the same academic year or summer period but for a different branch, click the down arrow in the school field to select the branch.

3. To view a summary and a list of student records with a different status, click the status in the summary pane on the left side of the dashboard.

   **NOTE:** Only statuses with at least one updated record may be selected.

Record-level and term-level filters are available to filter the list of student records further.

   **NOTE:** When selected, filters are applied only to the records in the selected status. Select the status from the status list before applying filters.

The record-level filters filter the list of student records by record information.

4. Click the down arrow in the **Updated By** field and select one of the following to indicate who updated the record.
   - **School** – indicates that the record was last updated by a school user
   - **PHEAA/Student** – indicates that the record was last updated by a PHEAA user or program, or that information was received electronically from a student
   - **School/PHEAA/Student** – total of all updates for the school, PHEAA and the student

5. Click the down arrow in the **Updated When** field and select a date from the drop-down list to indicate when the updates were made. This list includes the previous three weeks beginning with the current date.

6. Check one or more status in the **Record Status** field. This field displays when **All Statuses** is selected.

7. Click the down arrow in the **Special Conditions** field and select one of the following special conditions from the drop-down list. This field displays when **All Statuses, Complete-Active** or **Complete-Reject** are selected.
   - **Collectables** – Records for which PHEAA is collecting a State Grant award directly from the student. These records are sorted at the beginning of disbursement rosters. A special message displays on the Student Record when a collectable exists.
   - **Validation Processing** – Records that have been completed or canceled for PHEAA’s Income Validation.
   - **Late Processing** – Records where the student filed past the deadline but PHEAA extended the deadline for all students and reprocessed the student as on-time. For example, in 2012-13,
PHEAA extended the May 1, 2012 deadline to June 12, 2012 and the August 1, 2012 deadline to September 12, 2012.

The term-level filters filter the list of student records by term information.

8. In the **Term Level Filters** down arrow field, select **ANY** to filter data for any of the selected terms or **ALL** to filter data for all of the selected terms. Select **Fall, Winter** and/or **Spring**.

   **NOTE:** If no terms are selected, the filter will provide results for all terms.

9. In the **Eligibility Date** field, enter a date range in the **From** and **To** fields to view records for a specific date range where eligibility was determined or an award was canceled or adjusted. Enter the dates in MM/DD/YYYY format.

   **NOTE:** A Help icon displays to the left of the **Eligibility Date** field. Click the icon to display additional information about the eligibility date.

10. Click the down arrow in the **Reject Types** field and select a reject, or ineligibility, reason from the drop-down list.

11. Click the down arrow in the **Eligibility Status** field and select one of the following eligibility statuses from the drop-down list.
   - **Awarded** – Records that have an award greater than zero in the term or terms being filtered
   - **Reject** – Records that have an ineligibility reason in the term or terms being filtered
   - **Cancelled** – Records that have been canceled and have an award of zero in the term or terms being filtered. Results will show any cancellation reason
   - **Pending** – Records that are pending eligibility determination in the term or terms being filtered

12. Click the down arrow in the **Enrollment Mode** field and select the percentage of classroom and/or distance education instruction from the drop-down list.

13. Click the down arrow in the **Housing Status** field and select a housing status from the drop-down list.

14. In the **Enrollment Status** field select one or more enrollment statuses.

15. In the **Cancellation Reasons** field, select one or more cancellation reasons.

16. In the **Program of Study** field, select one or more programs of study. Programs of study do not display when All Schools is selected. This field is dynamic and displays choices based on the school and/or branch campus that was selected.
17. Click the **Apply Filters** button to apply the selected filters to the student list, or click the **Reset Filters** button to reset the filters to begin again.
The **Student List** is updated to display only the records that match the filter options.

The number of records that meet the filter criteria displays in the **Results** field and the following message in this example displays beneath the **Filter Records** section: **Displaying 1 – 1 out of 1 Student Records.**

The **Name/Address** field displays the student’s name and address on the most recent student record, which may not be the same as the academic year selected.

**NOTE:** Records are sorted in alphabetic order by last name, then first name.

The **SSN** field displays the student’s nine-digit Social Security number.

The **Award Counter** filed displays the total number of terms for all years for which the student has received a State Grant award.

**Fall, Winter** and **Spring** fields display term eligibility information such as an award amount, reject and cancellation reason codes, and enrollment and housing status.
The **Academic Year Total** field displays the total academic year award amount.

18. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. Refer to [View Student Records](#) for more information.

**NOTE:** The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the Search box at that top of the State Grant Portal.

Additional options display to export and view student records, and to add student records to a mass update queue.

19. Click the **Export to Excel/CSV** button to export the student list. Refer to [Export Student Records](#) for step-by-step instructions.

20. Click the **Go to First Record** button to go to the first student record and cycle through the records that match the filtered or unfiltered criteria. Refer to [View Student Records](#) for more information.

21. To select one or more records to add to a new mass update queue, check the boxes to the left of the **Name/Address** field. To select all records on the page, check the box in the header.

**NOTE:** The **Student List** displays 20 records per page. A maximum of 100 records may be added to a mass update queue. Click the arrow at the bottom of the Student List, not shown, to go to the next page to select additional records. In some cases, a record cannot be updated by a school user. It cannot be checked even if the school user checks the box in the header to select all records.

22. Click the **Add to Mass Update** button to add the selected record(s) to a new mass update queue. Refer to [Create Mass Update Queues](#) for step-by-step instructions.

**NOTE:** Selected student records are automatically added to the new queue. The academic year from the student list is not saved to the new queue.
Export Student Records

School users can export student records from the Student List or from the State Grant Dashboard. Records are exported to an Excel spreadsheet or Comma Separated Value (CSV) file. In this example, student records are exported from the Student List.

1. To export the entire student list, click **Export to Excel/CSV**.

   **NOTE:** Do not select individual records as the entire student list is exported. Selection boxes are used only to add students to mass update queues. Refer to the Create Mass Update Queues section for step-by-step instructions.
The **Export Student Records** pop-up screen displays.

2. In the **Name** field, enter up to 30 characters for the name of the export file using the guidelines below the field.

3. In the **Description** field, enter up to 255 characters for the description of the export using the guidelines below the field.

4. Click the down arrow in the **Format** field and select **Excel** or **CSV** from the drop down list. A description of each format displays below the field. The CSV format opens in Excel and uses code values in fields for use in automated processing. The Excel format uses English descriptions instead of codes.

5. Click **Submit** to export the student records, or click **Cancel** to cancel the export.
The **State Grants Records** page redisplay with a message that the export was successful. The message contains and a link to the My Exports page to download the file.

6. Click the link in the message box to go to the **My Exports** page, or click **View My Exports** in the **Alerts (Notifications)** box on the State Grants home page, not shown. Refer to **View My Exports** for more information.
View My Exports

School users can access the My Exports page from the Home page or the State Grants drop-down list or from the message that displays on the State Grants Records page when the student records are exported.

1. Click View My Exports on the State Grant home page or drop-down list, or click the link in the Alerts (Notifications) box on the right sidebar.
The **My Exports** page displays.

The **My Exports** page is used to view a school user’s exports. It displays exports that are in progress, exports that are ready to download, and exports that have already been downloaded. The export appears under the category corresponding to the export file’s status.

2. The **Requests in Progress** category displays exports that are not ready to download and require longer processing time due to the size of the file. To stop processing, click **Cancel**.

   **NOTE:** Currently, the process averages a download time of approximately 200 records per minute. If an export fails to progress to the ready to download stage after the expected time expires, please delete and try again. If the export fails repeatedly, please contact State Grant and Special Programs.

3. The **Requests Ready to Download** category displays exports that have been processed and are ready to download. Click **Download** to download the export file, click **Delete** to delete the export file, or click **View Details** to review the export file details.

   **NOTE:** Follow the prompts to download or delete the export file. Once the export file is downloaded, it displays in the **Requests That Have Been Downloaded** category. Users can download, delete or view the details of previously downloaded files using the same instructions in step 2.
The export details dialog box displays if the user selected, **View Details** on the **My Exports** page.

![Export Details Dialog Box](image)

The **Format** field displays the format of the export file, XLS or CSV.

The **Request Date** field displays the date and time the export was requested.

The **Completed Date** field displays the date and time the export was completed.

The **Last Downloaded Date** field displays the date and time the export file was last downloaded.

The **Available Until** field displays the last date and time the export file is available.

The **Description** field displays the description of the export file that was entered by the school user during the export.
Mass Update Queues

School users can create mass update queues to update information for more than one student record when certifying eligibility for the Pennsylvania State Grant. After a queue is created, school users may edit, process or delete information from the mass update queue.

Refer to the following sections for more information:
- Create Mass Update Queues
- Edit Mass Update Queue
- Process Mass Update Queue
- Delete Mass Update Queue
Create Mass Update Queues

School users may create a new mass update queue to update State Grant eligibility for multiple students.

1. Click **Create Mass Update Queue** from the **State Grants Home** page, the **State Grants** drop-down list or on the **State Grants Dashboard**.

**NOTE:** For academic years prior to 2018-19, refer to the **Create Mass Update Queue for Years Prior to 2018-19** section in this document.
The **Step 1 of 4 – Name Your Queue and Select Settings** page displays.

2. In the **Mass Update Queue** field, enter a descriptive name for the queue.

3. In the **Period** field, click the down arrow and select the academic period for the mass update.

4. In the **Branch Campus for Students to be Updated** field, click the down arrow and select the branch campus for which the updates are being made.

   **NOTE:** The **Branch Campus for Students to be Updated** field displays the school branches or corporate headquarters for which the school user is authorized to make updates. Users with authorization for multiple campuses must make a selection.

5. In the **Term(s)** field, check the term(s) for the mass update.

6. In the **Update Type** field, check **Update Records** or **Cancel or Reinstate Records**. Refer to the **Update Queue** and **Cancel or Reinstate Queue** sections for more information.

   **NOTE:** The **Ready to Succeed** option displays only for approved schools in the **Update Type** field. Refer to user guide *School Portal Ready-to-Succeed Scholarship Partner Interface* for more information about the Ready to Succeed programs.
Update Queue

Update Queue is used to update all student records in the queue with the exact same school enrollment or credit information.

1. In the **Update Type** field, select **Update Records**.

2. Click the **Continue** button.
The **Step 2 of 4 – Add Students to Your Mass Updates Queue** page displays.

The **Mass Update Queue** field displays the name of the queue entered on the previous page. To change the name of the queue, click the **Edit Queue Name** link.

The **Period**, **Campus**, **School**, **Term(s)** and **Update Type** fields display the information that was entered on the previous page.

3. To add records to the mass update queue, enter SSNs for each record that should be updated in the text box, up to 100 records. The SSN must be numeric and may contain dashes. Use commas, spaces, returns or tabs to separate more than one SSN.

4. Click the **Add Records** button.
The **Step 2 of 4 – Add Students to Your Mass Updates Queue** page redisplayed with the list of student records that have been added to the queue.

5. To remove records, click the **REMOVE** link to the left of the student record.

6. Click the **Continue** button. To delete the queue, click the **Delete Queue** button.

**NOTE:** If the school user clicks **Delete Queue**, the **Delete Queue** dialog box displays. Click the **Yes, Delete Queue** button to confirm the deletion.
The Step 3 of 4 – Choose the Updates for Your Queue page displays.

The Mass Update Queue field displays the name of the queue entered on the previous page. To change the name of the queue, click the Edit Queue Name link.

The Period, School, Campus, Term(s) and Update Type fields display the information that was entered in step one.

Updates can be made to school enrollment information.

School Information

7. In the Branch Campus Change field, click the down arrow and select the new branch campus.

   NOTE: The Branch Campus Change field displays only if the school has more than one branch or corporate headquarters and the school user is authorized to make updates. Users with authorization for multiple campuses may make a selection.

8. In the Program of Study field, click the down arrow and select a program of study.

9. In the Housing Status field, click the down arrow and select a housing status.
10. In the **Enrollment Status** field, click the down arrow and select an enrollment status.

11. In the **Enrollment Mode** field, click the down arrow and select the percentage of the student’s classroom or distance education enrollment from the drop-down list.

   **NOTE:** If the **Program of Study** field selection is **Distance Education**, then the **Enrollment Mode** field is protected.

12. Click the **Previous** button to return to step two, or click the **Continue** button.
The Step 4 of 4 – Review Your Mass Update Queue page displays.

The Mass Update Queue field displays the name of the queue entered on the previous page. To change the name of the queue, click Edit Queue Name.

The Period, School, Campus, Term(s) and Update Type fields display the information that was entered on the previous page.

The These Records will be Updated section displays a list of student names and SSNs that will be updated.

13. Click the Edit button to return to step 2 to edit the list of SSNs.

The With these Changes section displays the updates that will be made.

14. Click the Edit button to return to step 3 to edit the updates that will be made.

15. To delete the queue, click the Delete Queue button.

NOTE: A confirmation box, not shown, displays if the school user clicks Delete Queue. Click Yes, Delete Queue to delete the queue.
16. Click the **Export to Excel** button to export the update criteria to an Excel spreadsheet. See [Appendix B - Export Mass Update Reports to Excel](#) for more information.

17. Click the **Run Mass Update** button to run the update.
The results page displays when the school user clicks **Run Mass Update** on the previous page.

**WARNING**: If the school user leaves this page, he or she will not be able to return to view the results.

The **Period**, **Campus**, **School**, **Term(s)** and **Update Type** fields display the information that was entered on the previous page.

The **Successful Updates** section displays a list of accounts that have been updated successfully, including the current eligibility which may have changed as a result of the update.

The **Successful Updates – Pending Review** section, not shown, displays a list of accounts that have been updated successfully but the eligibility has not been recalculated and is pending a review by PHEAA.

The **Unsuccessful Updates** section, not shown, displays a list of accounts that have not been updated successfully. Unsuccessful accounts are saved in the queue for further review until the queue is deleted.

18. Click the **View Records Individually** link, not shown, to cycle through the records that have not been updated successfully.

19. Click the **Export to Excel** button to export the mass update report to an Excel spreadsheet. See **Appendix B - Export Mass Update Reports to Excel** for more information.
20. Click the Create Another Mass Update button to create another mass update queue using the instructions in this section.
Cancel or Reinstate Queue

Cancel or Reinstate Queues are used to update student records with cancellations or to reinstate awards. Cancellations include not enrolled, graduated and rejections for not making satisfactory academic progress. Reinstatements reverse those cancellations and reject reasons.

1. In the Update Type field, click Cancel or Reinstatement Records.

2. Click Continue.
The **Step 2 of 4 – Add Students to Your Mass Updates Queue** page displays.

The **Mass Update Queue** field displays the name of the queue entered on the previous page. To change the name of the queue, click **Edit Queue Name**.

The **Period, Campus, School, Term(s)** and **Update Type** fields display the information that was entered on the previous page.

3. In the text box, enter SSNs for each record that should be updated, up to 100 records. The SSN must be numeric. It may contain dashes. Use commas, spaces, returns or tabs to separate more than one SSN.

4. Click **Add Records**.
The **Step 2 of 4 – Add Students to Your Mass Updates Queue** page redisplay with the list of student records that have been added to the queue.

5. To remove records, check one or more boxes to the left of the student record and click **Remove**.

6. Click **Continue**. To delete the queue, click **Delete Queue**.

**NOTE:** If the school user clicks **Delete Queue**, the **Delete Queue** dialog box displays, not shown. Click **Yes, Delete Queue** to confirm the deletion.
The **Step 3 of 4 – Choose the Updates for Your Queue** page displays.

The **Mass Update Queue** field displays the name of the queue entered on the previous page. To change the name of the queue, click Edit Queue Name.

The **Period, Campus, School, Term(s)** and **Update Type** fields display the information that was entered in step one.

**Cancellation**

7. Select the type of cancellation to make to the student records.

**Reinstatement**

8. Select the type of reinstatement to make to the student records. The reinstatement type can only be used with a previous cancellation and must match the cancellation type.

9. Click the **Previous** button to return to step two, or click the **Continue** button.
The Step 4 of 4 – Review Your Mass Update Queue page displays.

The Mass Update Queue field displays the name of the queue entered on the previous page. To change the name of the queue, click Edit Queue Name.

The Period, Campus, School, Term(s) and Update Type fields display the information that was entered on the previous page.

The These Records will be Updated displays a list of SSNs that will be updated.

10. Click Edit to return to step 2 to edit the list of SSNs.

The With these Changes section displays the updates that will be made.

11. Click the Edit link to return to step 3 to edit the updates that will be made.

12. To delete the queue, click the Delete Queue button.

NOTE: A confirmation box, not shown, displays if the school user clicks Delete Queue. Click the Yes, Delete Queue button to delete the queue.
13. Click the **Export to Excel** button to export the update criteria to an Excel spreadsheet. Refer to [Appendix B - Export Mass Update Reports to Excel](#) for more information.

14. Click the **Run Mass Update** button to run the update.
The results page displays when the school user clicks **Run Mass Update** on the previous page.

**WARNING**: If the school user leaves this page, he or she will not be able to return to view the results.

The **Period**, **Campus**, **School**, **Term(s)** and **Update Type** fields display the information that was entered on the previous page.

The **Successful Updates** section displays a list of accounts that have been updated successfully, including the current eligibility which may have changed as a result of the update.

The **Successful Updates – Pending Review** section, not shown, displays a list of accounts that have been updated successfully but the eligibility has not be recalculated and is pending a review by PHEAA.

The **Unsuccessful Updates** section, not shown, displays a list of accounts that have not been updated successfully. Unsuccessful accounts are saved in the queue for further review until the queue is deleted.

15. Click the **View Records Individually** button, not shown, to cycle through the records that have not been updated successfully.
16. Click the **Export to Excel** button to export the mass update report to an Excel spreadsheet. See [Appendix B - Export Mass Update Reports to Excel](#) for more information.

17. Click the **Create Another Mass Update** button to create another mass update queue using the instructions in this section.
Edit Mass Update Queue

School users can edit mass update queues from the State Grants Dashboard when a mass update queue was created but not run.

1. Click the **Edit** link to update the mass update queue.
The **Step 2 of 4 – Add Students to Your Mass Updates Queue** page displays.

Make changes to the mass update queue using the instructions in the [Create Mass Update Queues](#) section.
**Process Mass Update Queue**

School users can process mass update queues from the State Grants Dashboard when a mass update queue was created but not run.

1. Click **Process** to process the mass update queue.
The **Step 3 of 4 – Choose the Updates for Your Queue** page displays.

Process, or run, the mass update queue using the instructions in the [Create Mass Update Queues](#) section.
Delete Mass Update Queue

School users can delete mass update queues from the State Grants Dashboard when a mass update queue was created but not run.

1. Click **Delete** to delete the mass update queue.
The **Delete Queue** dialog box displays.

2. Click the **Yes, Delete Queue** button to delete the mass update queue or click the **Cancel** button to close the dialog box without canceling the mass update queue.
Rosters & Disbursements

The Rosters & Disbursements section displays the summary of disbursements and the three most recent school disbursement roster cards. Disbursement roster cards display from newest to oldest dates. This section may also be used to certify rosters that are incomplete.

![Disbursement Summary](image)

The Disbursement Summary displays the date any disbursement information was last updated.

1. Click the Disbursement Summary to expand the fields.

The roster Disbursement Summary displays the following fields:

- **Total Awards**: Total awards disbursed
- **Calculated Disbursement**: Original grant disbursement amount calculated for the school
- **Adjusted Disbursement**: Adjusted disbursement amount, which is determined by the calculated disbursement amount multiplied by the disbursement percentage rate
- **Actual Disbursed Amount**: Actual amount of grant disbursements sent to the school. This amount equals the Adjusted Disbursement amount minus the Less Prior Year Refund amount.
- **Less Prior Year Refund**: Prior year refund amount
- **Total Special Checks**: Total amount of special checks
- **Total College Refund**: Total amount of college refund cards for the year or period, not including the program review refund amounts
- **Total Program Review Refund**: Total amount of all program review refund cards for the year or period.
• **Total PHEAA Collectable Refund**: Total PHEAA collectable amount. A collectable is an amount for which a student is not eligible and is the amount that the student owes PHEAA.

• **Balance Due to PHEAA**: Total disbursement amount due to be returned to PHEAA.

• **Balance Due to Institution**: Total disbursement amount due to the institution/school.

2. Click the **View Weekly Update and Roster** link to download previous school rosters from PageCenter. Refer to the PageCenter user guide for instructions on using PageCenter.

The disbursement information below the **Disbursement Summary** section displays the roster and disbursement information by term or subsequent disbursements. The information may include the status of the disbursement, the disbursement amount and the date paid, the predisbursement or disbursement roster date and the disbursement roster returned date. Click the **Load More** button, not shown, to display additional disbursement information, if available.

3. If the disbursement roster status is **Incomplete**, the school may certify the roster as long as the term has begun. If the term has not begun, the school may not certify the roster. Click the **Certify Roster** button to certify the roster for a specific term or disbursement.
The **Certification Statement** dialog box displays.

4. Review the certification statement.

5. Click the **Certify** button to certify the roster. Click the **Cancel** button to not certify the roster.
In this example, the **SUMMER DISBURSEMENT has been marked complete** message displays under the **Rosters & Disbursements** section of the page.

![Disbursement status updated](image)

The disbursement status is updated to **Completed**.

The Disbursement Amount and the Disbursement Roster Date Certified on date display for the updated disbursement roster.

**NOTE:** An institution activity record is added to capture the year/period, type of roster, date and time of the certification, and the user ID of the person who certified the roster. School users can view the school activity within the **View School Profile** option on the School Portal home page. Refer to the **View School Profile** and **Institution Activity Log** sections of this guide.
Refunds

The **Refunds** section displays the three most recent refund information cards. The refund cards display the refund date, refund amount and the source for any refunds. Refund cards display from newest to oldest dates.

1. Click the **Load More** button, not shown, to view additional refund information cards.
Request Primary School Change

School users can submit a request to update the student’s Primary School for the current academic year. Beginning with the 2016-17 academic year, secondary (alternate choices 2 through 10) do not display in the State Grant system. All requests must be made from the Home page or from the State Grants drop-down list.

1. Click Request Primary School Change on the Home page or select it from the State Grants drop-down list.
The **Change Primary School Request** page redisplayed when the primary school user makes a request from the State Grant Home page or drop-down list and when the secondary school user makes a request from the Student Record.

2. In the **SSN** field, enter the student’s nine-digital Social Security number.

3. In the **Student’s Last Name** field, enter the student’s last name.

   **NOTE:** The **SSN** and **Student’s Last Name** fields may be system-populated when a secondary school user accesses the **Change Primary School Request** screen through the Student Record.

In the **School Information** section, select the appropriate information for each term.

   **NOTE:** PHEAA disables the fall term annually around September 30th. The winter term displays for all schools—even those on a semester schedule—but data is not required.
4. Click the down arrow in the **Branch Campus** field and select a branch campus from the drop-down list, if applicable. If not applicable, this field displays the name of the school and cannot be changed.

5. Click the down arrow in the **Program of Study** field and select a program of study from the drop-down list. This field is dynamic and displays choices based on the school and/or branch campus that was selected in the **Branch Campus** field.

6. Click the down arrow in the **Housing Status** field and select a housing status from the drop-down list.

7. Click the down arrow in the **Enrollment Status** field and select the student’s enrollment status from the drop-down list. This includes enrollment status for the RTSS program.

8. Click **Submit** to submit the request, or click **Cancel** to return to the **State Grant Dashboard** without submitting the changes.
The **Change Primary School Request** redisplayed with a message the school change was successful.

9. Click **Update Another Student** to request another school update.

**IMPORTANT!** Requests are processed manually by date in the order in which they are received. Secondary school users can view the open request on the **Activity Log** on the Student Record. See **Activity Log** for more information.
View School Profile

School users may view the school demographic information and view and update contact information for their school. They may also view an activity log for school activity on the State Grant system.

1. On the School Portal home page, click View School Profile under the State Grants section or from the State Grants drop-down arrow below the School Portal logo.
The **School Profile** page displays.

The top of the page displays the demographic information for the school.

2. Click the down arrow for school period to change the school period being viewed.

3. Click the down arrow for the school Office of Education (OE) code and school name to select a different school if this school is a main campus.
The **Address** field displays the street address, city, state and ZIP code of the school.

The **OE Code** field displays the school’s eight-digit OE code and two-digit PHEAA-assigned suffix.

The **Title IV Code** field displays the six-digit Title IV loan code for the school.

The **PHEAA Code** field displays the six-digit PHEAA-assigned code for the school.

The **State Code** field displays the two-digit state code and state name.

The **Type** field displays the type of school sector.

The **Academic Schedule** field displays the academic schedule for the school, such as **SEMESTER** or **QUARTER**.

The **Fiscal Type** field displays the school’s fiscal responsibility type.

The **Main Campus** field displays **Yes** if the school has a unique Title IV code or when the Title IV code is shared among locations and has been designated as the initial application default school. This field displays **No** if the school is a branch campus and another location has been designated as the initial application default school.

The **PA Headquartered** field displays **Yes** or **No** to indicate if the headquarters of the school is located in Pennsylvania. This information may be blank if the school is not located in Pennsylvania.

The **State of Headquarters** field displays the name of the state where the school is headquartered. This information may be blank if the school is not located in Pennsylvania.

The **Access Partner** field displays the name of the PHEAA access partner for the school.

**NOTE:** If the school demographic information needs to be updated, contact PHEAA State Grants staff to update the information.

The middle of the page displays the **Contacts** tab and the **Activity Log** tab. The **Contacts** tab displays by default. Refer to the **Institution Activity Log** section for more information on the activity records.

The **Contacts** tab displays up to six contacts when the **School Profile** page initially displays. Click the **Load More** button, if applicable, to view additional contacts for the school.
Each contact card displays the following fields:

- **Contact Name**: First and last name of the contact
- **Primary Contact or Secondary Contact**: School title of the contact
- **Title**: Type of contact at the school
- **Program**: PHEAA-administered program associated with the contact
- **Phone**: Phone number of the contact
- **Fax**: Fax number of the contact
- **Email**: Email address for the contact
- **Last Updated By**: User ID or System ID which last updated the contact record
- **Updated on**: Date the contact information was last updated

To add a new contact, refer to the Add Contact section.

To update or delete a contact, refer to the Update Contact section.

To filter contacts for the school, complete the following fields as needed.

4. In the **Program** fields, check one or more of the following programs:
   - **Grant** (includes the Institutional Access Grant program)
   - **RTSS** - Ready to Succeed Scholarship
   - **EAP** - Education Assistance Program
   - **MFEP** - Military Family Education Program
   - **PA TIP** - Pennsylvania Targeted Industry Program

5. In the **Status** fields, check **Primary** and/or **Secondary** to indicate to search for the primary or secondary contacts.

6. In the **Name (First and/or Last)** fields, enter the first name and/or last name of the contact.

7. In the **Contact Type** field, select the contact type from the drop-down arrow.

8. Click **Apply Filters** to apply the selected filters. Click **Reset Filters** to reset the filters.
The **School Profile** page redisplayes with the filtered contact results.
**Add Contact**

Follow the steps below to add a new contact for the school.

1. Click **Add Contact** in the **Contacts** section on the **School Profile** page.
The Add Contact page displays.

![Add Contact Page]

The Status field displays Secondary.

2. In the Name (*First, *Last, Suffix) fields, enter the first name, last name and select the suffix of the contact person. The name fields are required.

3. In the Title field, enter the contact person’s title at the school. This field is required.

4. In the Program field, select the program. This field is required.

5. In the Contact Type field, select the type of school contact from the drop-down arrow. This field is required.

6. In the Phone and Ext fields, enter the 10-digit telephone number and four-digit extension of the contact. The phone fields are required.

7. In the Fax fields, enter the 10-digit fax number.

8. In the Email field, enter the contact’s email address. This field is required.

9. Click Save to save the new contact. Or click Cancel to cancel the changes. The success message displays after the new contact is successfully added.
**Update Contact**

Follow the steps below to update a contact for the school.

1. On the **School Profile** page, click the **Update** button under the desired contact to be updated, or to be deleted.
The school user must also click the **Update** button to access the **Update Contact** page to delete a secondary contact. Refer to the **Delete Contact** section.

**NOTE:** Only secondary contacts can be deleted.
The **Update Contact** page displays.

![Update Contact page](image)

The **Status** field displays **Primary** or **Secondary**.

2. In the **Name (\*First, \*Last, Suffix)** fields, enter the first name, last name and select the suffix of the contact person. The name fields are required.

3. In the **Title** field, enter the contact person’s title at the school. This field is required.

4. In the **Program** field, select the program. This field is required.

5. In the **Contact Type** field, select the type of school contact from the drop-down arrow. This field is required.

6. In the **Phone** and **Ext** fields, enter the 10-digit telephone number and four-digit extension of the contact. The phone fields are required.

7. In the **Fax** fields, enter the 10-digit fax number.

8. In the **Email** field, enter the contact’s email address. This field is required.
9. Click **Save** to save the changes. Or click **Cancel** to cancel the changes. The success message displays after the contact is successfully updated.
Delete Contact

1. To delete a contact, click **Delete Contact** on the **Update Contact** page.
The **Delete Contact** confirmation dialog box displays.

2. Click **Yes, Delete** to delete the contact or click **No, Cancel**.

After the contact is successfully deleted, the success message displays and the contact is removed from the **School Profile** page.

**NOTE:** If a contact is deleted in error, the contact must be added again. Refer to the **Add Contact** section of this guide.
**Institution Activity Log**

The **Activity Log** tab is available on the **School Profile** page. This log displays a list of activities for the school for the school period listed at the top of the page.

The **User Name/ID** field displays the name of the user who created the activity record and the user ID or the system ID for the system program which updated the record.
The **Activity Date** field displays the date the activity occurred.

The **Activity** field displays a description of the activity that occurred.

3. The Activity Log initially displays up to 12 records. Click **Load More** to display additional records for the school period.

4. Select a different school period from the drop-down arrow at the top of the page to view activity records for a different school period.
Appendix A - Eligibility Summary Data on FG0B and the Partner Interface

PHEAA offers school users the ability to view a student’s history using the Grant Eligibility Search transaction (FG0B) or the Eligibility Summary page on the Partner Interface—the FG0B equivalent on the Web. The ability to view this information is necessary for certifying that a student meets the satisfactory academic progress requirements for the Pennsylvania State Grant Program; however, for compliance and security purposes, PHEAA must limit the data a school user can view. In order to view the current and prior year information for a student, schools must be the primary choice in a State Grant record for which eligibility has been determined* for the academic year. The summer term is treated as a “header” for purpose of the Eligibility Summary. When applicable, the Eligibility Summary in the Partner Interface displays history prior to the 2007-08 academic year similar to FG0B. The table below provides examples.

<table>
<thead>
<tr>
<th>Available Data on FG0B/Eligibility Summary</th>
<th>Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Current academic year</td>
<td>• Your school is a primary choice in the State Grant record for at least one term of the current year; AND</td>
</tr>
<tr>
<td>• All prior academic years</td>
<td>• The State Grant record is in either an award or reject status</td>
</tr>
<tr>
<td>• No available data</td>
<td>• Your school is a primary choice in the State Grant record for at least one term of the current year; AND</td>
</tr>
<tr>
<td></td>
<td>• The current record is incomplete but not rejected; AND</td>
</tr>
<tr>
<td></td>
<td>• Your school was never a primary choice in a prior award year; OR</td>
</tr>
<tr>
<td></td>
<td>• Your school has never been a primary choice on a completed or incomplete State Grant record.</td>
</tr>
<tr>
<td>• All prior academic years</td>
<td>• Your school was a primary choice in a prior award year but not in the current award year.</td>
</tr>
<tr>
<td>• Upcoming academic year</td>
<td>• Your school is the primary choice for summer term; AND</td>
</tr>
<tr>
<td>• Current summer term</td>
<td>• The summer term record is in either an award or reject status.</td>
</tr>
<tr>
<td>• All prior year data</td>
<td></td>
</tr>
</tbody>
</table>

*Most records where eligibility has been determined have a status of **Complete/Active** or **Complete/Reject**; however, **Incomplete/Rejects** are considered to have had an eligibility determination for purposes of this display.
Appendix B - Export Mass Update Reports to Excel

Mass update reports can be exported to Excel. The steps are the same whether they are for update or cancel queues; however, they contain different content depending on whether they are exported before the update or after. See Before Mass Update and After Mass Update for more information.

**Before Mass Update**

If the export is done before the mass update is run, only the criteria for the update are exported to the Excel spreadsheet—not the results. The one-page spreadsheet includes the name of the queue, the current date and time, the settings selected, the changes that will be made, and a list of the records to be updated.
After Mass Update

If the export is done after the mass update is run, both the criteria and the results of the update are exported to a four-page Excel spreadsheet. The first page of the spreadsheet includes the name of the queue, the date and time exported, the settings selected, and the changes that were made. The remaining three tabs display a list of the students by the following update statuses: Successful, Pending Review, and Unsuccessful.

The example below shows the results for a successful mass update.
Appendix C: Prior Years Information

This section of the document describes screens that display different fields for prior years.

**Award Information – Secondary School (2-10 College Choice)**

For academic years prior to 2016-17, the Award Information tab displays a section labeled Estimated Eligibility for Your Institution between the Student Information and Grant Information sections when the user is not listed as a primary school in the State Grant record. Beginning with the 2016-17 academic year, the Award Information tab does not display for secondary school users. See Appendix A - Eligibility Summary Data on FG0B and the Partner Interface for more information.

Institutions are NOT Permitted to Use this Data to Credit an Award displays in red to the right of Estimated Eligibility for Your Institution.
The **Estimated Eligibility for Your Institution** section displays information about the student’s estimated eligibility for the secondary school.

The **Alternate School** field displays the alternate school’s eight-digit federal school code assigned by the Department of Education and the two-character suffix assigned by PHEAA, followed by the school’s name. This field displays only for academic years prior to 2016-17.

The **Full Time Award** field displays the potential eligibility if the student was enrolled at the secondary school full-time.

The **Part Time Award** field displays the potential eligibility if the student was enrolled at the secondary school part-time.

The **Housing** field displays the housing choice that was provided on the FAFSA for the secondary school.

**NOTE:** Estimated eligibility for **Secondary** school choices cannot be calculated when the choice is a Business, Trade and Technical school or a Nursing school because the student’s program of study and academic level are not collected on the FAFSA but are essential to calculating eligibility for these school types.

**NOTE:** To print the **Student Record** and the **Award Information** tab on one page, click **File** then **Print Preview** on the Web browser. Reduce the print size to 60% then select **Print**.

1. To change the student’s primary school to the alternate school, click the **Change Student’s School** link. See **Request Primary School Change** for step-by-step instructions.
Grant Information for Years Prior to 2018-19

For academic years which included the Distance Education Pilot Program prior to 2018-19, the Grant Information section of the Award Information tab displays credit fields.

The Classroom Credits field displays the number of credits the student is taking in a classroom.

The Online Credits field displays the number of credits the student is taking online.
Eligibility Summary for Years 2014 and Prior

The Eligibility Summary screen for academic year 2014-2015 and prior years displays different fields.

The following fields display:

- Halftime
- School Name (OE Code)
- Program of Study
- SG Actual Award/Reject
- SG Remedial Exception
- SG Award Counters
- SG Academic Level
- Cancellation Reason
- Adjustment Reason
- PHEAA EFC (expected family contribution)
• High School Graduate
• Application Filed
• Total Family Contribution
• High School Grad Year
• Veteran Status
• Financial Independent Status
• Inactivation Reason
View the State Grant Records Student List for Years Prior to 2018-19

The State Grant Records Student List displays when a school user selects View Records List in the Record Status List on the State Grants Dashboard. It displays in two panes: an abbreviated summary of the State Grants Dashboard, left; and a list of student records in the selected status, right. Options are available in the Filter Records section to filter and sort the records in the Student List. This section describes the fields that display for years prior to 2018-19.

1. To view a summary and a list of student records for the same time period in a different academic year or summer period, click the down arrow in the academic year field to select the academic year to display.

2. To view a summary and a list of student records for the same academic year or summer period but for a different branch, click the down arrow in the school field to select the branch.

3. To view a summary and a list of student records with a different status, click the status in the summary pane on the left side of the dashboard.

NOTE: Only statuses with at least one updated record may be selected.
Record-level and term-level filters are available to filter the list of student records further.

**NOTE:** When selected, filters are applied only to the records in the selected status. Select the status from the status list before applying filters.

The record-level filters filter the list of student records by record information.

4. Click the down arrow in the **Updated By** field and select one of the following to indicate who updated the record.
   - **School** – indicates that the record was last updated by a school user
   - **PHEAA/Student** – indicates that the record was last updated by a PHEAA user or program, or that information was received electronically from a student
   - **School/PHEAA/Student** – total of all updates for the school, PHEAA and the student

5. Click the down arrow in the **Updated When** field and select a date from the drop-down list to indicate when the updates were made. This list includes the previous three weeks beginning with the current date.

6. Check one or more status in the **Record Status** field. This field displays when **All Statuses** is selected.

7. Click the down arrow in the **Special Conditions** field and select one of the following special conditions from the drop-down list. This field displays when **All Statuses, Complete-Active** or **Complete-Reject** are selected.
   - **Collectables** – Records for which PHEAA is collecting a State Grant award directly from the student. These records are sorted at the beginning of disbursement rosters. A special message displays on the Student Record when a collectable exists.
   - **Validation Processing** – Records that have been completed or canceled for PHEAA’s Income Validation.
   - **Late Processing** – Records where the student filed past the deadline but PHEAA extended the deadline for all students and reprocessed the student as on-time. For example, in 2012-13, PHEAA extended the May 1, 2012 deadline to June 12, 2012 and the August 1, 2012 deadline to September 12, 2012.

The term-level filters filter the list of student records by term information.

8. In the **Term Level Filters** field, select a one or more terms. Select **Fall, Winter** and/or **Spring**.

   **NOTE:** If no terms are selected, the filter will provide results for all terms.
9. In the **Eligibility Date** field, enter a date range in the **From** and **To** fields to view records for a specific date range where eligibility was determined or an award was canceled or adjusted. Enter the dates in MM/DD/YYYY format.

   **NOTE:** A Help icon displays to the left of the **Eligibility Date** field. Click the icon to display additional information about the eligibility date.

10. Click the down arrow in the **Reject Types** field and select a reject, or ineligibility, reason from the drop-down list.

11. Click the down arrow in the **Eligibility Status** field and select one of the following eligibility statuses from the drop-down list.
   - **Awarded** – Records that have an award greater than zero in the term or terms being filtered
   - **Reject** – Records that have an ineligibility reason in the term or terms being filtered
   - **Cancelled** – Records that have been canceled and have an award of zero in the term or terms being filtered. Results will show any cancellation reason
   - **Pending** – Records that are pending eligibility determination in the term or terms being filtered

12. Click the down arrow in the **Credit Info** field and select **Reported** or **Not Reported** from the drop-down list.

13. Click the down arrow in the **Housing Status** field and select a housing status from the drop-down list.

14. In the **Enrollment Status** field select one or more enrollment statuses.

15. In the **Cancellation Reasons** field, select one or more cancellation reasons.

16. In the **Program of Study** field, select one or more programs of study. Programs of study do not display when All Schools is selected. This field is dynamic and displays choices based on the school and/or branch campus that was selected.

17. Click **Apply Filters** to apply the selected filters to the student list, or click **Reset Filters** to reset the filters to begin again.
The **Student List** is updated to display only the records that match the filter options.

The number of records that meet the filter criteria displays in the **Results** field and the following message displays beneath the **Filter Records** section: **Displaying 1 – 4 out of 4 Student Records**.

The **Name/Address** field displays the student’s name and address on the most recent student record, which may not be the same as the academic year selected.

**NOTE:** Records are sorted in alphabetic order by last name, then first name.

The **SSN** field displays the student’s nine-digit Social Security number.

The **Award Counter** field displays the total number of terms for all years for which the student has received a State Grant award.

**Fall, Winter** and **Spring** fields display term eligibility information such as an award amount, reject and cancellation reason codes, and enrollment and housing status.
The **Academic Year Total** field displays the total academic year award amount.

18. To view an individual student record, scroll over the student list to highlight a student record. Click the student record. See [View Student Records](#) for more information.

**NOTE:** The academic year and period selected are not updateable when accessing a student from a list. To access different years for the same student, use the **Search** box at that top of the State Grant Portal.
Update the Student Record for Years Prior to 2018-19

The **Student Record** section displays the fields of the student’s demographic, school and credit information sections open for edit. This section describes the fields that display for years prior to 2018-19.

The **Demographic Information** section displays the student’s demographic information.

1. In the **Address** field, enter the student’s home address. Enter the street address, city and zip code. Click the down arrow to select the state from the drop-down list.

2. In the **Phone** field, enter the student’s 10-digit home telephone number.

3. In the **Email** field, enter the student’s email address.
The **School Information** section displays information about the student’s school for all terms in the selected academic year. When the school on the State Grant record is not the same for each term, the school users are permitted only to submit updates for the term associated with their school. All other terms are protected and cannot be updated by school users.

4. The **Branch Campus** field displays the name of the school where the student is attending. This field is updateable only by authorized users at schools that have multiple campuses. To change the student’s branch campus, click the down arrow and select a branch campus from the drop-down list.

5. Click the down arrow in the **Program of Study** field and select the student’s program of study from the drop-down list.

6. Click the down arrow in the **Housing Status** field and select the student’s housing status from the drop-down list.

7. Click the down arrow in the **Enrollment Status** field and select the student’s enrollment status from the drop-down list.

8. Click the down arrow in the **Academic Level** field and select the student’s academic level from the drop-down list. This field displays for nursing schools only.

9. In the **<50% Classroom Attendance** field, check Select if less than 50% if the student’s classroom instruction is less than 50% of his enrolled credit hours.

The **Credit Information** section displays information about the credits the student is attempting for all terms in the selected academic year.

10. In the **Classroom Credits** field, enter the number of credits the student is taking in a classroom.

11. In the **Online Credits** field, enter the number of credits the student is taking online.

   **NOTE:** A Help icon displays to the left of the **Classroom Credits** and **Online Credits** fields. Click the icon to display additional information about classroom and online credits.

12. In the **School Notes** field, enter the comments regarding the update, if necessary.

13. Click **View Previous Comments** to view comments entered for previous updates. A pop-up box displays. This field is used by the school for informational purposes only and will not be reviewed by PHEAA staff.
14. Click **Submit Changes** to submit the updates made to the **Student Record** section, or click **Cancel** to close the **Student Record** section without submitting the updates.
Create Mass Update Queue for Years Prior to 2018-19

For years 2014-15 through 2017-18, the creation of a mass update queue includes fields for 50% classroom attendance and credit information.

The Step 1 of 4 – Name Your Queue and Select Queue Settings page displays.

1. In the Mass Update Queue field, enter a descriptive name for the queue.

2. In the Period field, click the down arrow and select the academic period for the mass update.

3. In the Branch Campus for Students to be Updated field, click the down arrow and select the branch campus for which the updates are being made.

   **NOTE:** The Branch Campus for Students to be Updated field displays the school branches or corporate headquarters for which the school user is authorized to make updates. Users with authorization for multiple campuses must make a selection.

4. In the Term(s) field, check the term(s) for the mass update.

5. In the Update Type field, check Update Records.

6. Click the Continue button.
The Step 2 of 4 – Add Students to Your Mass Updates Queue page displays.

The **Mass Update Queue** field displays the name of the queue entered on the previous page. To change the name of the queue, click **Edit Queue Name**.

The **Period**, **Campus**, **School**, **Term(s)** and **Update Type** fields display the information that was entered on the previous page.

7. To add records to the mass update queue, enter Social Security numbers for each record that should be updated in the textbox, up to 100 records. The SSN must be numeric and may contain dashes. Use commas, spaces, returns or tabs to separate more than one SSN.

8. Click the **Add Records** button.
The **Step 2 of 4 – Add Students to Your Mass Updates Queue** page redisplay with the list of student records that have been added to the queue.

9. To remove records, click the **REMOVE** link to the left of the student record.

10. Click the **Continue** button. To delete the queue, click the **Delete Queue** button.

**NOTE:** If the school user clicks **Delete Queue**, the **Delete Queue** dialog box displays, not shown. Click **Yes, Delete Queue** to confirm the deletion.
The **Step 3 of 4 – Choose the Updates for Your Queue** page displays.

The **Mass Update Queue** field displays the name of the queue entered on the previous page. To change the name of the queue, click the **Edit Queue Name** link.

The **Period**, **School**, **Campus**, **Term(s)** and **Update Type** fields display the information that was entered in step one.

Updates can be made to school enrollment information and credit information.

**School Information**

11. In the **Branch Campus Change** field, click the down arrow and select the new branch campus.

   **NOTE:** The **Branch Campus Change** field displays only if the school has more than one branch or corporate headquarters and the school user is authorized to make updates. Users with authorization for multiple campuses may make a selection.

12. In the **Program of Study** field, click the down arrow and select a program of study.

13. In the **Housing Status** field, click the down arrow and select a housing status.

14. In the **Enrollment Status** field, click the down arrow and select an enrollment status.
15. Check **<50% Classroom Attendance** if the student’s classroom attendance is less than 50 percent.

**Credit Information**

16. In the **Classroom Credits** field, enter the number of registered classroom credits as of the date the State Grant was credited.

17. In the **Online Credits** field, enter the number of registered online credits as of the date the State Grant was credited.

18. Click **Previous** to return to step two, or click **Continue**.
The Step 4 of 4 – Review Your Mass Update Queue page displays.

![Mass Update Queue Image]

The **Mass Update Queue** field displays the name of the queue entered on the previous page. To change the name of the queue, click the **Edit Queue Name** link.

The **Period**, **School**, **Campus**, **Term(s)** and **Update Type** fields display the information that was entered on the previous page.

The **These Records will be Updated** section displays a list of SSNs that will be updated.

19. Click the **Edit** button to return to step 2 to edit the list of SSNs.

The **With these Changes** section displays the updates that will be made.

20. Click the **Edit** button to return to step 3 to edit the updates that will be made.

21. To delete the queue, click the **Delete Queue** button.

   **NOTE:** A confirmation box, not shown, displays if the school user clicks **Delete Queue**. Click **Yes, Delete Queue** to delete the queue.
22. Click the **Export to Excel** button to export the update criteria to an Excel spreadsheet. See [Appendix B - Export Mass Update Reports to Excel](#) for more information.

23. Click the **Run Mass Update** button to run the update.
The results page displays when the school user clicks the Run Mass Update button on the previous page.

**WARNING**: If the school user leaves this page, he or she will not be able to return to view the results.

The **Period**, **Campus**, **School**, **Term(s)** and **Update Type** fields display the information that was entered on the previous page.

The **Successful Updates** section displays a list of accounts that have been updated successfully, including the current eligibility which may have changed as a result of the update.

The **Successful Updates – Pending Review** section, not shown, displays a list of accounts that have been updated successfully but the eligibility has not be recalculated and is pending a review by PHEAA.

The **Unsuccessful Updates** section, not shown, displays a list of accounts that have not been updated successfully. Unsuccessful accounts are saved in the queue for further review until the queue is deleted.

24. Click **View Records Individually**, not shown, to cycle through the records that have not been updated successfully.

25. Click the **Export to Excel** button to export the mass update report to an Excel spreadsheet. See **Appendix B - Export Mass Update Reports to Excel** for more information.
26. Click the **Create Another Mass Update** button to create another mass update queue using the instructions in this section.
Appendix D - Access Disbursement Certification

Previously, schools users accessed the **Disbursement Certification** form from the Home page or from the **State Grant** drop-down list. This process is described for schools that may have certified their disbursements using this method.

1. Click **State Grant Disbursement Certification** on the **Home** page or the **State Grant** drop-down list.
The AES Document Library opens to the Handbooks, Certification Procedures, Workshop Materials and Roster Certification Page.

2. Click XXXX-XX State Grant Disbursement Roster Certification Page. XXXX-XX indicates the academic year.
In this example, the 2021-22 **DISBURSEMENT CERTIFICATION** form displays.

3. In the **OE Code** field, enter the six- or eight-digit school ID assigned by the Department of Education.

4. In the **School Information** fields, enter the name, address and phone number of the school’s financial aid office.
5. Click the down arrow in the **Certification Period** field and select a certification period from the drop-down list.

6. Click the down arrows in the **Date of Roster** field and select the month, day and year of the disbursement roster.

7. In the **Name/Title** field, enter the name and title of the financial aid administrator or other school official who completed the **Disbursement Certification** form.

8. Click the down arrows in the **Date** field and select the month, day and year the **Disbursement Certification** form was completed.

9. In the **E-Mail Address of School Official** field, enter the email address of the financial aid administrator or other school official who completed the **Disbursement Certification** form.

10. Click **Submit** to submit the form, or click **Reset** to reset the form and start again.

**NOTE:** Entries are processed nightly Monday through Friday. School users can view the school activity on the **Activity Log** tab of the **School Profile** page. Refer to the **Institution Activity Log** section of this document.

**IMPORTANT!** School users should print this page **prior** to submission and keep a copy for their records.
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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