

# MASSAid School User Guide

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# Introduction

## 1 System Requirements

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### 1.1 Operating Systems

MASSAid runs on the following operating systems:

- Windows 2000
- Windows NT
- Windows XP
- Windows 7

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### 1.2 Hardware and Software

MASSAid has the following hardware and software requirements:

Equipment	Required
PC	133 MHz or faster Pentium
RAM	32 MB or higher
Disk drive	50 MB or higher
Internet access	Connection to the Internet
Browser	Internet Explorer 8.0 or higher
JavaScript	JavaScripting must be enabled
Cookies	Cookies must be enabled

Follow the steps below to insure JavaScript is enabled:

- In your Internet Explorer browser, choose Tools, then Internet Options
- Click the Security tab
- Click the Custom Level button
- Scroll down to the Scripting section, under Active Scripting choose "Enable"
- Click OK, if prompted to apply the new security settings, select "Yes"

# 2 System Users

Users are assigned “Administrator,” “Update,” “View Only” or “No Access” security level for each aid program by agency personnel who have been designated as “User Administration” users. A user can be assigned varying security levels for each aid program.

---

## 2.1 School User Roles

The “Administrator” level allows school users full school update capability for their school and full student update capability for students attending their school.

The “Update” level allows school users limited school and student update capability for the aid program for students attending their school.

The “View Only” level allows school users to view all school and student information for the aid program for students attending their school with no update capabilities.

The “No Access” level provides no access to the aid program. The “No Access” level provides no access to the aid program.

# 3 Login and Account Management

Users navigate to MASSAid through the agency website at <https://massaid-guarantorsolutions.com>

## 3.1 Login

The first time you log into MASSAid you will have the option to register your computer, you will have to change your password and select a personal image. After that, you will only need to enter your user name and password to log in.



MASSAid

Massachusetts Department of Higher Education  
Office of Student Financial Assistance

MASSAid  
Log In

User Name:

This site requires Internet Explorer 7 or greater. You can click [Here](#) if you wish to download Internet Explorer now!

LOG IN

From the Log In page, follow these steps:

1. Enter a valid User Name.
2. Click [Log In].
  - 2.1 If this is the first time you have logged in, the Computer Registration screen will display.

---

*Note: You will have to register your computer each time you log in through a different computer or if you choose not to register the computer.*

---



**MASSAid**  
**Computer Registration**

*The computer you are using is not registered with us. A registration code has been sent to your email address and/or SMS address on file. DO NOT CLOSE THIS WINDOW until you have obtained your registration code.*

Registration Code

*This is the only place where you enter the registration code.*

**Trouble obtaining your registration code? Please contact your MASSAid account administrator at 1.617.391.6070 or email us at [osfait@osfa.mass.edu](mailto:osfait@osfa.mass.edu) for assistance.**

**Save Time!**

Register this computer now to skip this step next time you login from this computer (Cookies must be enabled).

*We recommend that you only register private computers, such as a home or work computer. We recommend that you do not register public computers, such as a library computer.*







**CONTINUE**

- 2.1.1 Do not close this screen, a registration code is sent to the email address that is listed on your user profile (if you close this screen you will need to start over).
- 2.1.2 Once the registration code is received via email, copy and paste (or type) it in the Registration Code field.
- 2.1.3 If using a non-public computer (your home or office), select the check box to register your computer.
- 2.1.4 Click [Continue].
- 2.2 If you have not selected a personal image, the Personal Image Selection screen will display.

**MASSAid**  
**Personal Image Selection**

*Your Personal Image helps you know for sure that you are at the valid site. Every time you sign in, you will see your Personal Image after you enter your User Name.*

**Please select a Personal Image:**

**SAVE**


- 2.3 Click on a radio button below an image; this is the image that will display on the Enter Password screen each time you login to ensure you are at the correct website.
- 2.4 Click [Save].
3. The Enter Password screen will display.

MASSAid  
Enter Password

Confirm your Personal Image is correct

*If you recognize your Personal Image, you'll know for sure that you are at the correct site. Confirming your Personal Image is also how you'll know that it's safe to enter your Password.*

Your Personal Image



*If you don't recognize your Personal Image, do not enter your password.*

Password:

[Forgot your password? Click here.](#)

*Incorrect Personal Image showing? Please contact your MASSAid account administrator at 1.617.391.6070 or email us at [osfa@osfa.mass.edu](mailto:osfa@osfa.mass.edu) for assistance.*

LOG IN

4. Verify your personal image and enter your password.
5. Click [Log In].
  - 5.1 If your password has expired, the Password Expiration screen will display.

MASSAid  
Change Password

Your Password has expired. Please change it now.

OK

- 5.2 Click [OK] and the Change Password is displayed.

MASSAid  
Change Password

Passwords are case sensitive, cannot be the same as the User Name, must be 8-25 characters in length, and must contain characters from 3 of the following 4 categories: uppercase letter, lowercase letter, number, special character.

Old Password

New Password

Re-enter New Password

SAVE CANCEL

- 5.3 Enter your Old Password.
  - 5.4 Enter your New Password.
  - 5.5 Re-enter your New password.
  - 5.6 Click [Save].
6. The Choose an Application page displays and you are successfully logged in.

MASSAid  
Choose an Application

*Note: By gaining access to the system, you certify that you are an employee or agent of the institution for which this user name has been issued. You further agree to the terms and conditions of the Privacy Policy and Accessibility Statement. Access without permission may subject you to civil penalties or criminal prosecution.*

MASSAID

[View MASSAid Privacy Policy](#)  
[View MASSAid Accessibility Statement](#)

*To protect your personal information always click [Exit System] when you are finished.*

EXIT SYSTEM

User Administration

CHANGE PASSWORD

EDIT USER INFORMATION

7. Click [MASSAid] to enter the MASSAid system.

## 3.2 Change Password

Users can change their password at any time. Passwords expire every 90 days; at that time the system will force the user to change their password.

From the Choose an Application page, follow these steps:

1. Click [Change Password] and the Change Password screen is displayed.

2. Enter your Old Password.
3. Enter your New Password.

---

*Note: Passwords are case sensitive, must be at least 6 characters, must be a combination of letters and numbers and must not exceed 25 characters. The New Password cannot be the same as the Old Password. Passwords cannot be the same as the user name.*

---

4. Re-enter your New Password.
5. Click [Save].
6. The next time you log in, you will be required to use your new password.

### 3.3 Edit User Information

Users can maintain some of their own user information.

From the Choose an Application page, follow these steps:

1. Click [Edit User Information] and the User Information screen is displayed.

2. You may edit the following fields (required fields are in **bold**):
  - 2.1 Middle Initial
  - 2.2 **Last Name**

### 2.3 Email Address

3. To change your personal image, select the 'Change personal image' link and the Personal Image Selection screen is displayed.

MASSAid  
Personal Image Selection

*Your Personal Image helps you know for sure that you are at the valid site. Every time you sign in, you will see your Personal Image after you enter your User Name.*

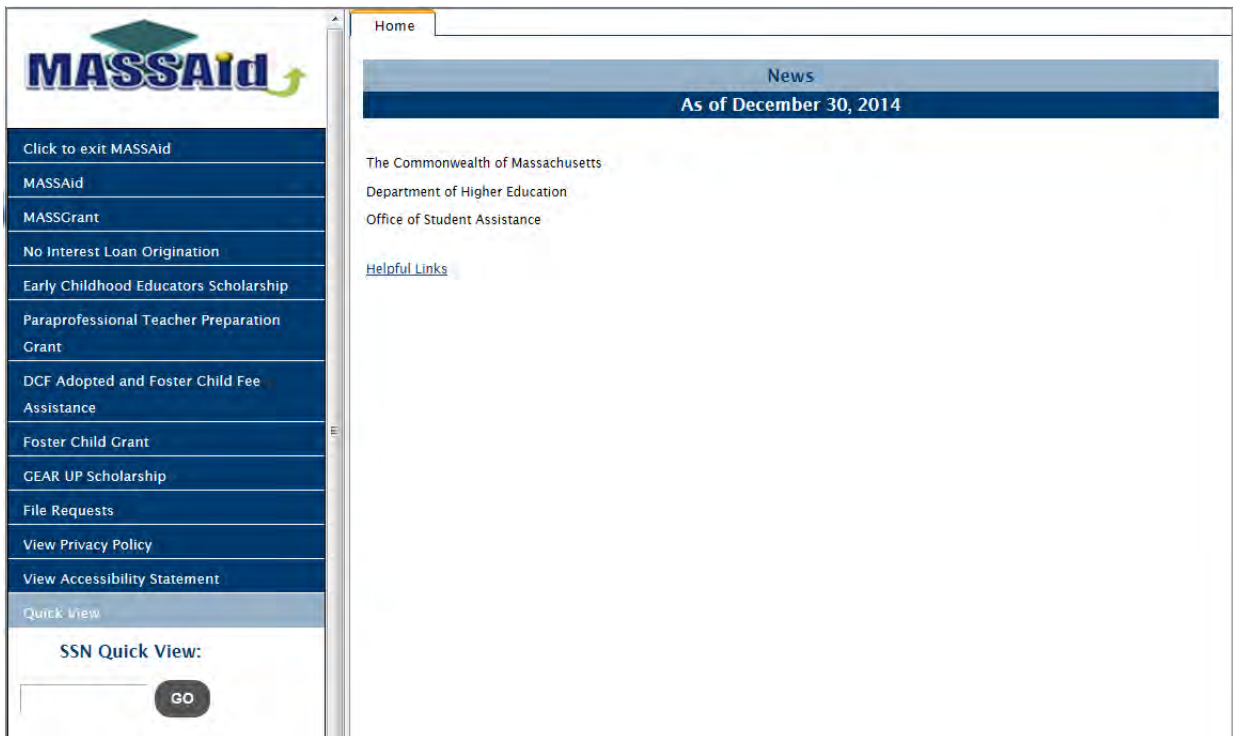
Please select a Personal Image:

SAVE

- 3.1 Click on a radio button below an image; this is the image that will display on the Enter Password screen each time you login to ensure you are at the correct website.
  - 3.2 Click [Save].
  - 3.3 The User Information screen is displayed with your updated personal image.
4. Click [Save].

# 4 Navigation

MASSAid provides user-friendly navigation. The left pane provides menu options available, based on role and security level. As the user selects a function, a sub-menu will appear. As options are selected, information displays in the right pane in a new tab.



*Note: This is a sample menu; not all menu options are displayed and not all displayed menu options are available to all users.*

## 4.1 Standard Menu

The standard menu for school users contains, at most, the following options:

- MASSAid
  - Reports
  - Search
  - Send Email
  - Help
- MASSGrant

- Award Rules
- School Profile
- Payment History
- Information Roster
- Certification
- Request Reinstatement
- Clear Ineligible Reasons
- Reconcile Payments
- Reconcile Year-End YY/YY – *only displayed when the prior year-end has not been reconciled*
- Owe Refund Students
- No Interest Loan Origination
  - NIL Award Info
  - School Profile
  - Payment History
  - NIL Promissory Note Creation
- Early Childhood Educators Scholarship
  - Award Rules
  - School Profile
  - Payment History
  - Certification
  - Request Reinstatement
  - Reconcile Payments
  - Reconcile Year-End YY/YY – *only displayed when the prior year-end has not been reconciled*
- Paraprofessional Teacher Preparation Grant
  - Award Rules
  - School Profile
  - Payment History
  - Certification
  - Request Reinstatement
  - Reconcile Payments
  - Reconcile Year-End YY/YY – *only displayed when the prior year-end has not been reconciled*
- DCF Adopted and Foster Child Fee Assistance
  - Award Rules

- School Profile
- Payment History
- Reconcile Payments
- Reconcile Year-End YY/YY – *only displayed when the prior year-end has not been reconciled*
- Create DCF Fee Assistance Records
- Foster Child Grant
  - Award Rules
  - School Profile
  - Payment History
  - Certification
  - Request Reinstatement
  - Reconcile Payments
  - Reconcile Year-End YY/YY – *only displayed when the prior year-end has not been reconciled*
  - Submit Financial Aid Data
- GEAR UP Scholarship
  - Award Rules
  - School Profile
  - Payment History
  - Certification
  - Request Reinstatement
  - Reconcile Payments
  - Reconcile Year-End YY/YY – *only displayed when the prior year-end has not been reconciled*
  - Submit Financial Aid Data
- File Requests
- View Privacy Policy
- View Accessibility Statement
- Quick View

---

## 4.2 Quick View Menu

The Quick View menu displays in the left pane after you enter a student SSN in the SSN Quick View field. The Quick View menu has, at most, the following options:

- Existing MASSGrant (listed by academic year)
- Existing No Interest Loan (listed by academic year)



- Existing Grants/Scholarship (listed by academic year)
    - Early Childhood Educators Scholarship
    - Paraprofessional Teacher Preparation Grant
    - GEAR UP Scholarship
    - Foster Child Grant
    - DCF Fee Assistance
  - Transaction History
  - Payment History
- 

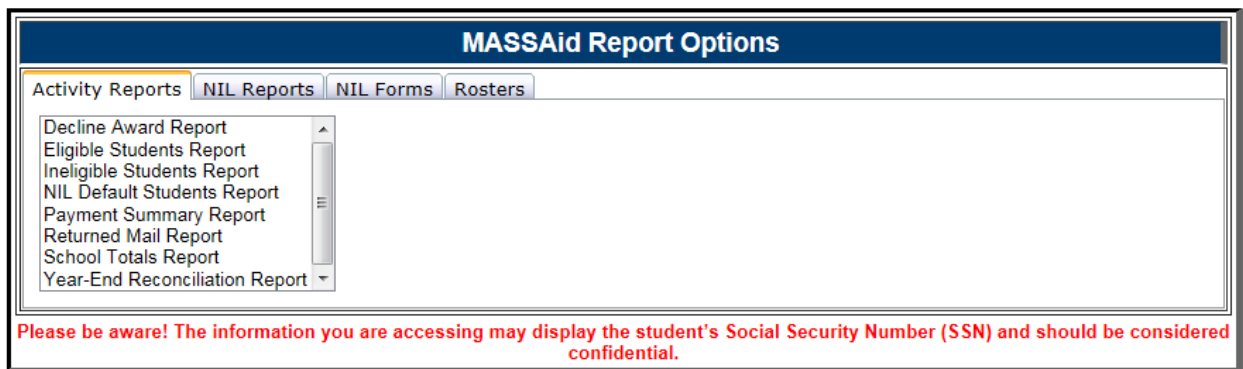
## 4.3 Log Out

All users log out of MASSAid by selecting “**Click to exit MASSAid**,” displayed in the standard menu. To fully log out of all applications, select the [Exit System] button on the Choose an Application page.

## 1 Reports

MASSAid provides a variety of reports and letters. Reports are grouped under tabs based on the following categories:

- Activity Reports
- NIL Reports (*only for users with NIL access*)
- NIL Forms (*only for users with NIL access*)
- Rosters



To access any report:

1. Select MASSAid then Reports on the standard menu, the Report Options screen displays.
2. Select a report tab to display all reports available in that grouping.
3. Select a report; any report criteria that must be selected is displayed.
4. Select/enter the report criteria needed to generate the report.
5. Click [Generate Report].
6. The report results will display in a new tab and can be printed or saved from this view.

---

### 1.1 Activity Reports

Activity Reports provide information on student grant and scholarship status/activity and include the following reports:

### **1.1.1 Decline Award Report**

This report displays all students who have declined the MASSGrant award for the selected academic year, aid program and school sorted by the selected display option.

#### ***Input Criteria***

1. Academic Year
  - 1.1 Current – Default
  - 1.2 Future (if applicable)
2. Aid Program
3. School
  - 3.1 All Schools selected by default
4. Display: (determines how the data sorts)
  - 4.1 Alphabetical by Last Name - Default
  - 4.2 Numerical by SSN

#### ***Output on Report***

1. Student Name
2. SSN
3. Term Award Declined
4. Institution

### **1.1.2 Eligible Students Report**

This report displays all eligible students for the selected academic year, aid program and school sorted by the selected display option.

#### ***Input Criteria***

1. Academic Year
  - 1.1 Current – Default
  - 1.2 Future (if applicable)
2. Aid Program
3. School
  - 3.1 All Schools selected by default
4. Display: (determines how the data sorts)
  - 4.1 Alphabetical by Last Name - Default
  - 4.2 Numerical by SSN

#### ***Output on Report***

1. Student Name

2. SSN
3. Total Award
4. Fall Amount
5. Spring Amount
6. Summer Amount (*if applicable to the aid program*)
7. Summer2 Amount (*if applicable to the aid program*)

### **1.1.3 Ineligible Students Report**

This report displays all ineligible students for the selected academic year, aid program and school sorted by the selected display option.

#### ***Input Criteria***

1. Academic Year
  - 1.1 Current – Default
  - 1.2 Future (if applicable)
2. Aid Program
3. School
  - 3.1 All Schools selected by default
4. Display: (determines how the data sorts)
  - 4.1 Alphabetical by Last Name - Default
  - 4.2 Numerical by SSN
  - 4.3 Chronological by Number of Days Remaining to Clear Ineligible Reasons

#### ***Output on Report***

1. Student Name
2. SSN
3. Number of Days Remaining to Clear Ineligible Reasons
4. Ineligible Reason(s)

### **1.1.4 NIL Default Students Report**

This report displays students who have been reported as in default in the latest NIL Default (ECSI) file and have a FAFSA on file for the selected academic year.

#### ***Input Criteria***

1. Academic Year
  - 1.1 Current – Default
  - 1.2 Future (if applicable)

### ***Output on Report***

1. Student Name
2. SSN

## **1.1.5 Payment Summary Report**

This report displays all payment and refund transactions for the selected academic year, aid program and school.

### ***Input Criteria***

1. Academic Year
  - 1.1 Current – Default
  - 1.2 Future (if applicable)
2. Aid Program
3. School

### ***Output on Report***

1. Payment Batches
  - 1.1 Batch Date
  - 1.2 Batch Number
  - 1.3 Number of Students
  - 1.4 Payment Batch Amount
  - 1.5 Actual Amount Paid
2. Process Pre-Payment/Returned Funds
  - 2.1 Date
  - 2.2 Type
  - 2.3 Amount
3. Refunds
  - 3.1 Date
  - 3.2 SSN
  - 3.3 Student Name
  - 3.4 Term
  - 3.5 Amount
4. Balance Due OSFA
5. Balance Due School

## 1.1.6 Returned Mail Report

This report displays students who have been flagged as mail returned for the selected academic year and selected school.

### ***Input Criteria***

1. Academic Year
  - 1.1 Current – Default
  - 1.2 Future (if applicable)
2. School
  - 2.1 All Schools selected by default

### ***Output on Report***

1. Student Name
2. SSN
3. Address
4. City
5. State
6. Zip5
7. Zip4

## 1.1.7 School Totals Report

This report displays all students with payment records for the selected academic year, aid program and school.

### ***Input Criteria***

1. Criteria
  - 1.1 Awarded – Default
  - 1.2 Paid

---

*Note: If “Awarded” is selected, payments in all statuses are displayed. If “Paid” is selected, only “Paid” payments are displayed.*

---

2. Academic Year
  - 2.1 Current – Default
  - 2.2 Future (if applicable)
3. Aid Program
4. School
  - 4.1 All Schools selected by default
5. Display: (determines how the data sorts if “All Schools” is selected)
  - 5.1 Alphabetical by School - Default

## 5.2 Grouped by School Type

### ***Output on Report***

1. School
2. Student Name
3. SSN
4. Fall Amount
5. Spring Amount
6. Summer Amount (*if applicable to the aid program*)
7. Summer2 Amount (*if applicable to the aid program*)
8. Total Amount

## **1.1.8 Year-End Reconciliation Report**

This report displays all year-end batches that are reconciled for the selected academic year and aid program.

### ***Input Criteria***

1. Academic Year
  - 1.1 2 Prior
  - 1.2 Prior – Default
2. Aid Program

### ***Output on Report***

1. Institution
2. Reconciled Date
3. Number of Students Paid-in-full
4. Number of Students Partially Refunded
5. Number of Students Fully Refunded
6. Amount Due OSFA

---

## **1.2 NIL Reports**

NIL Reports report on student No Interest Loan records in relation to their status and payments and include the following reports:

### **1.2.1 NIL Activity Report**

This report displays all students with a NIL record in the selected status for the acyear and school selected.

### ***Input Criteria***

1. Academic Year
  - 1.1 Prior
  - 1.2 Current – Default
2. School
3. Status

### ***Output on Report***

1. School
2. SSN
3. Name
4. Status
5. Amount
6. Amount Paid

## **1.2.2 NIL Default Students Report**

This report displays students who have been reported as in default in the latest NIL Default (ECSI) file and have a FAFSA on file for the selected academic year.

### ***Input Criteria***

1. Academic Year
  - 1.1 Current – Default
  - 1.2 Future (if applicable)

### ***Output on Report***

1. Student Name
2. SSN

## **1.2.3 NIL Disbursement Roster**

This report displays all students paid within the specified batch.

### ***Input Criteria***

1. Batch Number

### ***Output on Report***

1. SSN
2. Name
3. Address
4. Phone Number



5. Dependency Status
6. Loan Amount
7. Fall Disbursement (if applicable)
8. Spring Disbursement (if applicable)
9. Summer Disbursement (if applicable)
10. Total Disbursement

## **1.2.4 NIL History Report**

This report displays all students with a NIL record in any status who meet the selected criteria.

### ***Input Criteria***

1. Academic Year
  - 1.1 Prior
  - 1.2 Current – Default
2. School
3. SSN (optional)
4. Loan Period Begin Date (optional)
  - 4.1 Start
  - 4.2 End
5. Loan Period End Date (optional)
  - 5.1 Start
  - 5.2 End
6. Graduation Date (optional)
  - 6.1 Start
  - 6.2 End
7. Promissory Note Date (optional)
  - 7.1 Start
  - 7.2 End

### ***Output on Report***

1. Name
2. SSN
3. Address
4. Phone
5. Dependency Status
6. Loan Period Begin Date
7. Loan Period End Date

8. Graduation Date
9. PNote Created Date
10. PNote Status
11. Loan Amount
12. PNote Unique ID
13. Fall Requested Date
14. Fall Disbursed Date
15. Fall Amount
16. Fall Cancel Date
17. Spring Requested Date
18. Spring Disbursed Date
19. Spring Amount
20. Spring Cancel Date
21. Summer Requested Date
22. Summer Disbursed Date
23. Summer Amount
24. Summer Cancel Date

### **1.2.5 NIL Reconciliation Roster**

This report displays all students with paid payments for the acyear and school selected.

#### ***Input Criteria***

1. Academic Year
  - 1.1 Prior Years (default is the prior year)
2. School

#### ***Output on Report***

1. Paid Date
2. SSN
3. Name
4. Term
5. Amount

### **1.2.6 NIL Students Roster**

This report displays all students “Eligible” for NIL for the selected acyear and school.

#### ***Input Criteria***

1. Academic Year

- 1.1 Prior
- 1.2 Current – Default
- 1.3 Next (if applicable)
2. School
3. Display (determines how the data sorts)
  - 3.1 Alphabetical by Last Name – Default
  - 3.2 By EFC

***Output on Report***

1. Name
2. SSN
3. Address
4. City, State, Zip
5. Phone Number
6. EFC
7. Dependency Status
8. NIL Lifetime Award
9. Max Loan Amount

---

## **1.3 NIL Forms**

NIL Forms are the generic forms needed to manage the No Interest Loan program and include the following forms:

### **1.3.1 Entrance Interview Form**

This blank form generates as a .PDF; multiple copies can be generated via the PDF viewer.

### **1.3.2 NIL Application and Solicitation Form**

This blank form generates as a .PDF; multiple copies can be generated via the PDF viewer.

### **1.3.3 Private Education Loan Applicant Self-Certification Form**

This blank form generates as a .PDF; multiple copies can be generated via the PDF viewer.

---

## **1.4 Rosters**

Rosters report on the status of student grants and scholarships in relation to their payments and include the following reports:

## 1.4.1 Certification Roster

This report displays all students with a payment record in 'Ready to Certify' status for the selected academic year, aid program, term and institution.

### ***Input Criteria***

1. Academic Year
  - 1.1 Current – Default
  - 1.2 Future (if applicable)
2. Program
3. School
4. Term
  - 4.1 Fall
  - 4.2 Spring
  - 4.3 Summer
  - 4.4 Summer2
5. Display (determines how the data sorts)
  - 5.1 Alphabetical by Last Name – Default
  - 5.2 Numerical by SSN

### ***Output on Report***

1. Student Name
2. SSN
3. EFC
4. Term
5. Amount

## 1.4.2 Information Roster

This report displays all students with a MASSGrant record for the selected academic year and institution.

### ***Input Criteria***

1. Academic Year
  - 1.1 Current – Default
  - 1.2 Future (if applicable)
2. School
3. Term
  - 3.1 Fall
  - 3.2 Spring

4. Display (determines how the data sorts)
  - 4.1 Alphabetical by Last Name – Default
  - 4.2 Numerical by SSN

### ***Output on Report***

1. Student Name
2. SSN
3. Address
4. City
5. State
6. Zip
7. EFC
8. Student AGI
9. Student Taxes Paid
10. Student Worksheet A
11. Student Worksheet B
12. Student Worksheet C
13. Student Number in Family
14. Student Number in College
15. Parent AGI
16. Parent Taxes Paid
17. Parent Worksheet A
18. Parent Worksheet B
19. Parent Worksheet C
20. Parent Number in Family
21. Parent Number in College
22. Dependency Status
23. Terms Paid
24. Grade Level
25. Term Amount (if applicable)
26. Ineligible Reason(s) (if applicable)

### **1.4.3 Payment Roster**

This report displays all students with a payment record or refund in 'Paid' status for the selected academic year, aid program, term and institution.

### ***Input Criteria***

1. Academic Year
  - 1.1 Current – Default
  - 1.2 Future (if applicable)
2. Program
3. School
4. Term
  - 4.1 Fall
  - 4.2 Spring
  - 4.3 Summer
  - 4.4 Summer2
5. Display (determines how the data sorts)
  - 5.1 Alphabetical by Last Name – Default
  - 5.2 Numerical by SSN
  - 5.3 Chronological by Paid Date

### ***Output on Report***

1. Student Name
2. SSN
3. Paid Date
4. Term
5. Amount

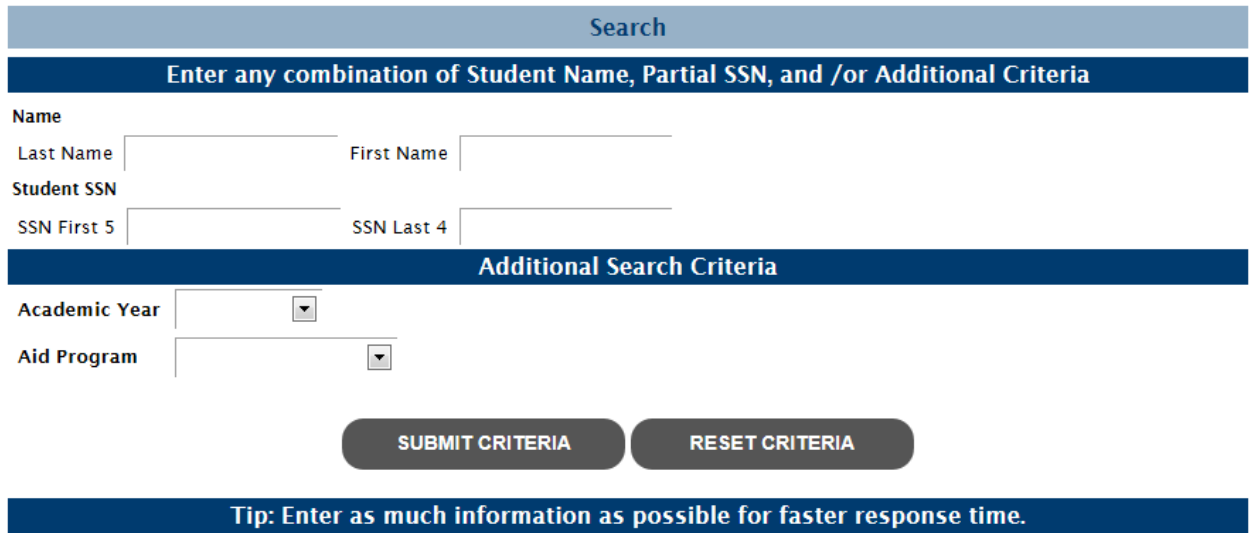
# 2 Search

## 2.1 Enter Search Criteria

You can search for students or search for specific student grant and scholarship detail records based on the search criteria entered. Entering multiple criteria will narrow your search.

To perform a search, follow these steps:

1. Select MASSAid then Search from the menu, the Search Criteria screen displays.



**Search**

**Enter any combination of Student Name, Partial SSN, and /or Additional Criteria**

**Name**

Last Name  First Name

**Student SSN**

SSN First 5  SSN Last 4

**Additional Search Criteria**

Academic Year

Aid Program

**SUBMIT CRITERIA** **RESET CRITERIA**

**Tip: Enter as much information as possible for faster response time.**

2. Enter student search criteria:
  - 2.1 Full or partial Last Name
  - 2.2 Full or partial First Name
  - 2.3 SSN First 5
  - 2.4 SSN Last 4

---

*Note: If only student search criteria are entered, a listing of students meeting the criteria will be displayed; no detail records will display.*

---

3. Enter additional search criteria:
  - 3.1 Academic Year
  - 3.2 Aid Program

---

*Note: School users will only get search results back on students attending their school.*

---

4. If an Aid Program is selected, additional aid program search criteria is displayed:
  - 4.1 Search Type
    - 4.1.1 Payment Status
    - 4.1.2 Eligible Status
    - 4.1.3 Ineligible Status
    - 4.1.4 P-Note Status (*only if aid program "NIL" selected*)
  - 4.2 If Payment Status is selected, additional search criteria is displayed:
    - 4.2.1 Status – a list of valid payment statuses for the selected aid program
      - 4.2.1.1 If 'Not Paid' is selected, additional search criteria is displayed:
        - 4.2.1.1.1 No Award Reason
    - 4.2.2 Term
  - 4.3 If Eligible Status is selected, additional search criteria is displayed:
    - 4.3.1 Status – a list of valid eligible statuses for the selected aid program
  - 4.4 If Ineligible Status is selected, additional search criteria is displayed:
    - 4.4.1 Status – a list of valid ineligible statuses for the selected aid program
  - 4.5 If P-Note Status is selected, additional search criteria is displayed:
    - 4.5.1 Status – a list of valid P-Note statuses for NIL
5. Click [Submit Criteria] and the search results meeting your criteria will display
6. To clear any criteria you have entered, click [Reset Criteria]

---

*Note: At minimum, Last Name, SSN or Academic Year must be entered to perform a search.*

---

## 2.2 Understanding Your Search Results

Your search results may include detailed grant and scholarship data and payment information; you can use these results as a work queue.

### 2.2.1 Populate Quick View Menu from Search Results

From the search results, you can click a student SSN link to populate the Quick View menu for the selected SSN. With the Quick View menu populated, you can navigate to additional information for the selected student.

When you return to Search, the most recent search criteria are displayed so the search can be quickly performed again.



# 3 Send Email

MASSAid allows you, as school users, to communicate via email with the agency.

To send an email, follow these steps:

1. Select MASSAid then Send Email from the menu. The Send Email screen is displayed.

Send E-Mail to Agency

Email Recipient

Select Aid Program MASSGrant

Email Message

Your Name: Rebecca User  
E-Mail Address: user@grantpro.com  
Subject:  
Message to Send:

Do NOT include a student's full Social Security Number (SSN) in this email. If you need to reference a student, only provide the last 4 digits of the SSN.

SEND

2. Select an aid program

---

*Note: The email will go to the email address on file on the selected aid program's Award Rules screen.*

---

3. Enter a Subject
4. Enter a Message
5. Click [Send].

The email will be sent to the selected recipient; a copy of the email will be sent to you.

# 4 Help

MASSAid provides a comprehensive user guide for the MASSAid system.

---

## 4.1 View User Guide

To access the User Guide system, follow this step:

1. Select MASSAid then Help on the standard menu.
2. The How Can We Help You? Interface is displayed.
3. Select the 'View School User Guide' link and the user guide is displayed.

# MASSGrant

## 1 Award Rules

The Award Rules contain the annual award amounts, cutoff values, and cutoff dates necessary to administer each aid program.

### 1.1 View MASSGrant Award Rules

To view the award rules, follow these steps:

1. Select MASSGrant then Award Rules and the Award Rules screen is displayed.

Award Rules	
MASSGrant	
Academic Year 2014 - 2015	
Change Academic Year: Year 2014 To 2015	
EFC Cutoff	5157
# Days to Clear Ineligible Reasons	22
# Days Extension to Clear Ineligible Reasons for Insufficient Residency Docs	14
Application Deadline Date	05/01/2014
Residence Cutoff Date	08/31/2014
Information Rosters Available	04/15/2014
Fall Certification Available	09/08/2014
Spring Certification Available	01/12/2015
Program Email Address	rbrun@osfa.mass.edu

[VIEW PAYMENT TABLE](#)

The award rules are displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

### 1.2 View MASSGrant Payment Table

The MASSGrant payment table displays the annual award amount that will be awarded to students based on EFC and school type.

To view the MASSGrant payment table, follow these steps:

1. From the MASSGrant Award Rules screen, click [View Payment Table].

2. The MASSGrant Payment Table screen is displayed.

MASSGrant Payment Table Academic Year 2014 - 2015								
All fields must be whole amounts that are divisible by 2.								
Award Amounts								
	Private	Public University	Public State College	Public Community	Proprietary	Voc/Tech	Nursing	Out-of-State
EFC 0-200	1700	1500	1100	900	600	500	800	300
EFC 201-500	800	600	600	600	600	400	600	300
EFC 501-1000	700	500	500	500	500	400	500	300
EFC 1001-1500	600	500	500	400	400	400	400	300
EFC 1501-2000	500	400	400	400	400	400	400	300
EFC 2001-5157	400	400	400	400	400	400	400	300
EFC 5158-999999	0	0	0	0	0	0	0	0

**RETURN TO AWARD RULES**

*Note: This is a sample Payment Table for the MASSGrant program; actual award amounts may vary.*

The MASSGrant Payment Table is displayed for the academic year from which you viewed the Award Rules. To view an alternate academic year, return to the Award Rules screen and select the year in the Change Academic Year field at the top of the screen then select [View Payment Table].

## 2 School Profile

The School Profile contains school demographic and academic year information for all aid programs.

---

### 2.1 View MASSGrant School Profile

To view the MASSGrant school profile, follow these steps:

1. Select MASSGrant then School Profile from the menu.
2. The MASSGrant School Profile is displayed.

The school profile is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

**View School Profile**  
**Test College, 999999- 00**

Change Academic Year: Year 2014 to 2015

**Academic Year**  
**2014 to 2015**

School OECODE	999999
School Branch	00
Vendor ID	VC999999999999999
Tax Identification Number (TIN)	
School Name	Test College
Address	1 COLLEGE STREET
Address2	
City	Any Town
State	Massachusetts
Zip Code	01610 - 2395
Phone Number	
Fax Number	
School Type	Massachusetts Private 4-year

**Program: MASSGrant**

Contact Name	Johnny Contact
Contact Title	DBA
Contact Email Address	jcontact@email.com
Phone Number	333-333-3333
Fax Number	222-222-2222
Secondary Contact Name	Susie Contact
Secondary Contact Title	DBA2
Secondary Contact Email Address	scontact@email.com
Secondary Phone Number	444-444-4444
Secondary Fax Number	555-555-5555
Active	Yes
Fall Certification Duration	60
Fall Reinstated Certification Duration	20
Spring Certification Duration	60
Spring Reinstated Certification Duration	20
Reconciliation Duration	30
Hold Payments	No

## 2.2 Update MASSGrant School Profile

To update the MASSGrant school profile, you must have security level of “Update” or “Administrator” for MASSGrant. Follow these steps:

1. From the MASSGrant School Profile screen, click [Update].

---

*Note: School profiles can only be updated for the current and future academic years.*

---

2. The Update School Profile screen is displayed.
3. Edit one or more of the following fields (fields in **bold** are required):

---

*Note: Only fields updateable by school users will be enabled for update.*

---

- 3.1 Contact Name
  - 3.2 Contact Title
  - 3.3 Contact Email Address
  - 3.4 Phone Number
  - 3.5 Fax Number
  - 3.6 Secondary Contact Name
  - 3.7 Secondary Contact Title
  - 3.8 Secondary Contact Email Address
  - 3.9 Secondary Phone Number
  - 3.10 Secondary Fax Number
4. Click [Save].

---

## 2.3 View MASSGrant School Transaction History

The school transaction history displays updates made to the school profile chronologically by academic year. In addition, any comments entered online display in chronological order among the transactions.

To view a school's Transaction History, follow these steps:

1. From the MASSGrant School Profile screen click [Transaction History]
2. The School Transaction History screen is displayed.

Updates to school demographics are not associated to an academic year; these updates display at the top of the transaction history.

---

## 2.4 View MASSGrant School Payment History

To view the school's payment history for an aid program, follow these steps:

1. From the MASSGrant School Profile screen click [Payment History]
2. The Payment History screen is displayed.

Payment History							
AMERICAN INTERNATIONAL COLLEGE, 002114-00							
Current Balance: \$0.00				Change Academic Year 2014-2015			
Academic Year 2014-2015							
Date	Program	Term	Type	Batch Number	Reconciled	Number Of Students	Payment Amount
11/18/2014	MASSGrant	Fall	Payment	<a href="#">B0120808</a>	N	1	\$850.00
11/14/2014	MASSGrant	Fall	Payment	<a href="#">B0120774</a>	N	1	\$298.00
11/06/2014	MASSGrant	Fall	Adjustment	<a href="#">B0120445-B0120698</a>		1	(\$200.00)
11/06/2014	MASSGrant	Fall	Adjustment	<a href="#">B0120445-B0120699</a>		1	(\$298.00)
11/05/2014	MASSGrant	Fall	Adjustment	<a href="#">B0120445-B0120681</a>		1	(\$850.00)
11/03/2014	MASSGrant	Fall	Adjustment	<a href="#">B0120445-B0120646</a>		1	(\$50.00)
10/20/2014	MASSGrant	Fall	Adjustment	<a href="#">B0120445-B0120517</a>		5	(\$2,398.00)
10/09/2014	MASSGrant	Fall	Payment	<a href="#">B0120445</a>	Y	376	\$243,550.00
<b>Total:</b>							<b>\$240,902.00</b>

**CANCEL**

The school payment history is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen

---

*Note: The Current Balance represents any outstanding balance between the school and OSFA. If the Current Balance is positive, monies are owed to the school from OSFA. If the Current Balance is negative, monies are owed to OSFA from the school.*

---

## 2.4.1 View School Payment Batch Details

To view the details of a payment batch for a school, follow these steps:

1. From the School Payment History screen, select a Batch Number.
2. The School Payment Batch Details screen is displayed.

Payment Batch Detail					
AMERICAN INTERNATIONAL COLLEGE, 002114-00					
Batch # B0106627					
11/07/2013					
Name	SSN	Payment Type	Term	Payment Amount	
1. BERBERENA, JOSELYN	599-99-9999	Payment	Fall	\$800.00	
2. MBENGAM, ANNA	199-99-9999	Payment	Fall	\$800.00	
3. PIERRE, ASHLEY	299-99-9999	Payment	Fall	\$150.00	
4. ROMANENKO, OLGA	399-99-9999	Payment	Fall	\$800.00	
<b>Total:</b>				<b>\$2,550.00</b>	
<b>Total Sent To School:</b>				<b>\$2,550.00</b>	

The 'Total Sent to School' may differ from the 'Total' due to an outstanding balance for the school at the time the batch was paid.

**CLOSE**



---

*Note: If there is a Current Balance for a school when the payment batch is created, the amount is netted with the payment amount. If this occurs, the 'Total Sent to School' will differ from the 'Total' of the payment batch.*

---

## 2.5 Add Comment on School Profile

Users can enter comments for display on the school's Transaction History.

To enter a comment for a school, follow these steps:

1. From the School Profile screen click [Comments].
2. The Add Comments screen is displayed.



3. Enter comment text.
4. Click [Save].

# 3 Information Roster

School users must access all MASSGrant students prior to the certification process to verify data and, if applicable, package awards. Through the online Information Roster, school users can access an electronic file.

Users have the option to download the cumulative information roster or simply print an Information Roster report (see *Reports section*).

## 3.1 Download Cumulative Information Roster File

Users can download a Cumulative Information Roster file and save it.

*Note: The download option is available to all schools, but each school must be set up to process the file through their school based software for this feature to be useful.*

To download the information roster, follow these steps:

1. Select MASSGrant then Information Roster from the menu. The Select Academic Year and Term screen is displayed.

Cumulative Information Roster  
MASSGrant

Select Academic Year and Term

Academic Year 2015 ▼

Term ▼

You are about to download the Cumulative Information Roster in a Comma Separated Value (CSV) file format that can be loaded into your school based software for processing ([click here](#) to view the file layout specifications).

If you do not want to download a file, you can access this same data as a printable report via the Reports/Rosters menu option.

DOWNLOAD INFORMATION ROSTER

2. Select an academic year and term and click [Download Information Roster].

*Note: An academic year is available for selection based on the information roster available dates displayed on the MASSGrant Award Rules screen.*

- The Verity Criteria screen displays. Verify that the year, program and term have been selected and click [Download File].

**Verify Criteria**

Select ACYear:	2015	▼
Select Program:	MASSGrant	▼
Select Institution:	ALBRIGHT COLLEGE	▼
Select Term:	Fall	▼

**DOWNLOAD FILE**

- The File Request screen is displayed. Refresh the screen until the file has completed processing; indicated by a Down Arrow icon in the Download column.

**File Requests**

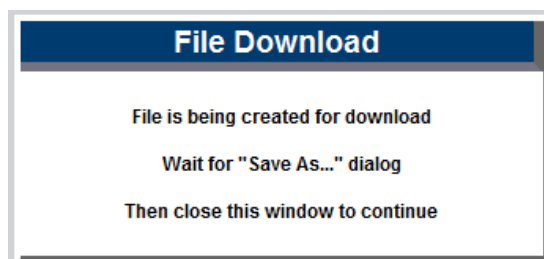
Select Institution: 900002-02, NEW SCHOOL ▼

File Type	Request Date	Status	User Name	Aid Program	Term	Download
Download MASSGrant Information Roster	05-24-2011	File has been received and is awaiting processing.	rgrahamMASS500	MASSGrant	Fall	▼

*Note: Users may navigate away while waiting for the file to process. Simply select File Requests from the main menu to return to this screen and view the file status.*

*Once the file has completed, the status column will indicate the file has completed successfully or indicate there were errors. You may select the status column for additional details.*

- Select the Down Arrow icon.
- A File Download message displays and then the standard Open/Save/Save As dialog box displays.



- Select [Open] to view the file.
- Select [Save] or [Save As] to save the file.

**Go to MASSAid/Help to see the Cumulative Information Roster File Layout**

# 4 Certification

School users must certify all student awards in order for the students to be paid. Through online certification or the download/upload certification file feature, school users have multiple ways to easily certify students.

---

## 4.1 MASSGrant Online Certification

Users can certify students, and make data element changes prior to certification, through the online certification roster.

To begin the certification process, follow these steps:

1. Select MASSGrant then Certification from the menu. The Select Academic Term screen is displayed.

Select Academic Term

Fall ▾

UPLOAD ROSTER    CERTIFICATION ROSTER    DOWNLOAD ROSTER

2. Select a term.

---

*Note: A term must be available for certification (per the Award Rules screen) in order to be selected. The screen will default to the most recent term available for certification.*

---

3. Click [Certification Roster] and the Data Element Changes screen is displayed.

**CATHOLIC UNIVERSITY**  
**Fall 2014-2015 Data Element Changes**  
**MASSGrant**

5 Students Remaining to Certify

Filter:

**APPLY FILTER**

**REMOVE FILTER**

To update student/parent data prior to certification, please select the student. Once all changes are made, please select [Go To Certification] to begin the certification process.

◀ Page ▶

Name	SSN	EFC	Dependency Status
<a href="#">Malik Bernadeau</a>	xxx-xx- 0632	5141	Dependent
<a href="#">Matthew Bracci</a>	xxx-xx- 4481	2882	Independent
<a href="#">Joseph Eder</a>	xxx-xx- 1774	2256	Independent
<a href="#">Jonathan Kirby</a>	xxx-xx- 5904	2395	Dependent
<a href="#">Caroline Kirby</a>	xxx-xx- 7010	4318	Dependent

**GO TO CERTIFICATION**

**CANCEL**

*Note: Students can be filtered by last name by entering a full or partial last name and selecting [Apply Filter]. Students can be sorted by Name or SSN by selecting the column header.*

### 4.1.1 Data Element Changes Prior to Certification

To make data element changes prior to certification, follow these steps:

1. From the Data Element Changes screen, select a student.
2. The Update Financial Information screen is displayed for the selected student.

Reason	<input type="text"/>	Dependency Status	Dependent
EFC	5141	Parent Number in Household	3
Student Number in Household	<input type="text"/>	Parent Number in College	1
Student Number in College	<input type="text"/>	Parent Number of Exemptions	3
Student Number of Exemptions	<input type="text"/>	Parent AGI	52558
Student AGI	<input type="text"/>	Parent Taxes Paid	3151
Student Taxes Paid	<input type="text"/>	Parent Tax Form	IRS 1040
Student Tax Form	<input type="text"/>	Parent Untaxed Total	00005886
Student Untaxed Total	00000000	Parent Additional Total	00000000
Student Additional Total	00000000	Parent Net Worth of Investments	0
Student Net Worth of Investments	0	Parent Cash, Savings and Checking	0
Student Cash, Savings and Checking	0	Parent Net Worth of Business/Inv Farm	0
Student Net Worth of Business/Inv Farm	0	Mother Income Work	<input type="text"/>
Student Income Work	0	Father Income Work	52558

**SAVE**

**CANCEL**

3. Edit one or more of the following fields (fields in **bold** are required):

3.1 **Reason**

3.2 EFC

---

*Note: If the EFC is updated, at least one additional field (other than Reason) must be updated.*

---

3.3 **Dependency Status**

3.4 Student Number in Household

3.5 Parent Number in Household

3.6 Student Number in College

3.7 Parent Number in College

3.8 Student Number of Exemptions

3.9 Parent Number of Exemptions

3.10 Student AGI

3.11 Parent AGI

3.12 Student Taxes Paid

3.13 Parent Taxes Paid

3.14 Student Tax Form

3.15 Parent Tax Form

3.16 Student Untaxed Total

3.17 Parent Untaxed Total

3.18 Student Additional Total

3.19 Parent Additional Total

3.20 Student Net Worth of Investments

3.21 Parent Net Worth of Investments

3.22 Student Cash, Savings and Checking

3.23 Parent Cash, Savings and Checking

3.24 Student Net Worth Business/Inv Farm

3.25 Parent Net Worth Business/Inv Farm

3.26 Student Income Work

3.27 Mother Income Work

3.28 Father Income Work

---

*Note: All 'Parent' fields are disabled if the student's Dependency Status is "Independent."*

---

4. Click [Save].

The updated Data Element Changes screen displays, and student eligibility is re-determined.

## 4.1.2 Online Certification Roster

To certify students online, follow these steps:

1. From the Data Element Changes screen, click [Go To Certification].
2. The Online Certification Roster screen is displayed.

5 Students Remaining to Certify

Filter: 
APPLY FILTER
REMOVE FILTER

⏪ Page ⏩

Certify	Name	SSN	# Days Remaining to Certify	EFC	Current Award Amount	Additional Options
<input type="radio"/> Pending <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> No-Keep-Spring	MALIK BERN	006-06-0606	20	5141	\$150.00	<input type="checkbox"/> Reduce Award <input style="width: 50px;" type="text"/> \$ <input style="width: 50px;" type="text"/>
<input type="radio"/> Pending <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> No-Keep-Spring	MATTHEW J. BRAC	044-44-4444	20	2882	\$150.00	<input checked="" type="checkbox"/> No Award <input style="width: 50px;" type="text"/> \$ <input style="width: 50px;" type="text"/> 0.00 <span style="color: red;">*Required</span>
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> No-Keep-Spring	JOSEPH P. EDER	012-01-0101	20	2256	\$150.00	
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> No-Keep-Spring	CAROLINE N. KIRBY	003-03-0303	20	4318	\$150.00	
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> No-Keep-Spring	JONATHAN M. KIRBY	003-04-0404	20	2395	\$150.00	

I certify that the students who are indicated as eligible for payment of a MASSGrant, have completed all verification and eligibility requirements, including citizenship and academic progress, as specified in the program guidelines.

SAVE
CANCEL

3. Enter/select the following for each student:

### 3.1 Certification indicator

- 3.1.1 Pending (default) – student will remain on roster if selected
- 3.1.2 Yes
- 3.1.3 No
- 3.1.4 No, Keep Spring (Fall certification roster only)

---

*Note: On the Fall Certification Roster, selecting 'No' will cancel the Fall and Spring award. Selecting 'No, Keep Spring' will only cancel the Fall award.*

---

### 3.2 If 'Yes' is selected, additional options display

#### 3.2.1 Reduce Award (checkbox)

---

*Note: If the Reduce Award checkbox is selected, the Reduce Award Reason and Amount fields are enabled and required*

---

#### 3.2.2 Reduce Award Reason

- 3.2.2.1 EFC Change
- 3.2.2.2 Overaward



---

*Note: If an award is reduced due to an EFC change, you will be required to change the EFC prior to certification.*

---

- 3.2.3 Amount
- 3.3 If 'No' or 'No, Keep Spring' is selected, additional options display
  - 3.3.1 No Award - selected
  - 3.3.2 Reduce Award Reason
    - 3.3.2.1 Not Enrolled
    - 3.3.2.2 Less Than Full-time
    - 3.3.2.3 Unsatisfactory Progress
    - 3.3.2.4 Overaward
    - 3.3.2.5 Leave of Absence
    - 3.3.2.6 Verification Incomplete
    - 3.3.2.7 Other
  - 3.3.3 Amount – pre-filled to \$0

4. Click [Save].

All payment records for students certified to receive an award will be updated to “Ready to Pay” and will be available for payment by the Agency.

---

## 4.2 Download Certification Roster

Users can download a Certification Roster for processing in their school based software.

---

*Note: The download option is available to all schools, but each school must be set up to process the file through their school based software for this feature to be useful.*

---

To download the certification roster, follow these steps:

1. Select MASSGrant then Certification from the menu. The Select Academic Term screen is displayed.

Select Academic Term

Fall

UPLOAD ROSTER    CERTIFICATION ROSTER    DOWNLOAD ROSTER

2. Select a term and click [Download Roster].

---

*Note: A term must be available for certification (per the Award Rules screen) in order to be selected. The screen will default to the most recent term available for certification.*

---

- The Verity Criteria screen displays. Verify the program, institution and term selected, click [Download File].

**Verify Criteria**

Select Program:

Select Institution:

Select Term:

You are about to download the Certification Roster in a Comma Separated Value (CSV) file format that can be loaded into your school based software for processing ([click here](#) to view the file layout specifications).

If you do not want to download a certification file, you can certify online via the Certification menu option.

DOWNLOAD FILE

- The File Request screen is displayed. Refresh the screen until the file has completed processing; indicated by a Down Arrow icon in the Download column.

**File Requests**

Select Institution:

File Type	Request Date	Status	User Name	Aid Program	Term	Download
Download MASSGrant Certification Roster	12-06-2011	File request has been received and is awaiting processing.	rgrahamMASS500	MASSGrant	Fall	


*Note: Users may navigate away while waiting for the file to process. Simply select File Requests from the main menu to return to this screen and view the file status.*

*Once the file has completed, the status column will indicate the file has completed successfully or indicate there were errors. You may select the status column for additional details.*

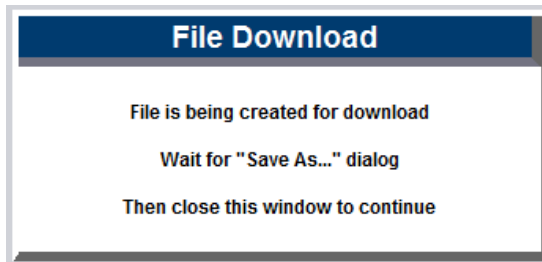
- Select the Down Arrow icon.

**File Requests**

Select Institution:

File Type	Request Date	Status	User Name	Aid Program	Term	Download
Download MASSGrant Certification Roster	12-06-2011	The File has completed successfully.	rgrahamMASS500	MASSGrant	Fall	

- A File Download message displays and then the standard Open/Save/Save As dialog box displays.



7. Select [Open] to view the file.
8. Select [Save] or [Save As] to save the file.

**Go to MASSAid/Help to see the Certification Roster File Layouts**

---

## 4.3 Upload Certification Roster

Users can upload a Certification Roster populated from their school based software to certify students.

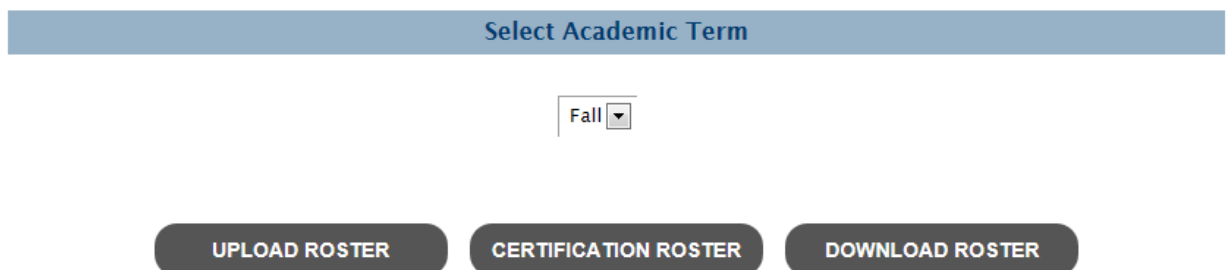
---

*Note: The upload option is available to all schools, but each school must be set up to process files through their school based software for this feature to be useful.*

---

To upload the certification roster, follow these steps:

1. Select MASSGrant then Certification from the menu. The Select Academic Term screen is displayed.



2. Select a term and click [Upload Roster].

---

*Note: A term must be available for certification (per the Award Rules screen) in order to be selected. The screen will default to the most recent term available for certification.*

---

3. The Verity Criteria screen displays. Verify the program, institution and term selected, click [Upload File].

### Verify Criteria

Select Program:  ▼  
 Select Institution:  ▼  
 Select Term:  ▼

You are about to upload a Certification Roster in a Comma Separated Value (CSV) file format that can be used to electronically certify students at your school([click here](#) to view the file layout specifications).

If you do not want to upload a certification file, you can certify online via the Certification menu option.

**UPLOAD FILE**

- The Upload Certification Roster screen is displayed.


### Upload Certification Roster

File:

I certify that the students who are indicated as eligible for payment of a MASSGrant in the attached file, have completed all verification and eligibility requirements, including citizenship and academic progress, as specified in the program guidelines.

**UPLOAD**

- Click [Browse] and browse to the certification file to be uploaded, click [Open].
- The file name will populate, click [Upload].
- The File Request screen is displayed. Refresh the screen until the file has completed processing; indicated by a Down Arrow icon in the Download column.

File Requests						
Select Institution: <input type="text" value="001437-00, CATHOLIC UNIVERSITY"/> ▼						
File Type	Request Date	Status	User Name	Aid Program	Term	Download
Download MASSGrant Certification Roster	12-06-2011	The File has completed successfully.	rgrahamMASS500	MASSGrant	Fall	
Upload MASSGrant Certification Roster	12-06-2011	File request has been received and is awaiting processing.	rgrahamMASS500	MASSGrant	Fall	

*Note: Users may navigate away while waiting for the file to process. Simply select File Requests from the main menu to return to this screen and view the file status.*

*Once the file has completed, the status column will indicate the file has completed successfully or indicate there were errors. You may select the status column for additional details.*

- Once the file has completed processing, select the 'Status' column, the File Processing Information screen will display.

File Processing Information	
File Date: 11/29/2011	
File Name: MASSGrantCertUpload_2011112912073725.txt	
Processing Messages	
Number of Records Parsed from File = 7	
Number of Records With EFC Changes = 0	
Number of Records Certified = 7	
File Requests	

*Sample if all records processed*

File Processing Information	
File Date: 11/29/2011	
File Name: MASSGrantCertUpload_2011112913072455.txt	
Processing Messages	
Number of Records Parsed from File = 2	
222-22-2222 - Must submit additional data element changes with an EFC Change	
888-88-8888 - The 'Award Amount' cannot be lower than the published award amount unless it is due to 'Overaward'	
Number of Records With EFC Changes = 1	
Number of Records Certified = 0	
File Requests	

*Sample if there were errors found*

- Users may upload another certification roster file to fix any errors reported; students with errors were **not** certified.

**Go to MASSAid/Help to see the Certification Roster File Layouts**

# 5 Clear Ineligible Reasons

School users have the ability to clear ineligible reasons in batch for the MASSGrant program for Citizenship Status, Prior Bachelors Degree Received, Answered Yes to Drug Question, and Loan Default and/or Refund Owed on Federal Financial Aid.

---

## 5.1 Clear Ineligible Reasons in Batch

Users can clear ineligible reasons in batch for MASSGrant for a given school. Follow these steps:

1. Select MASSGrant then Clear Ineligible Reasons from the menu. The Select Ineligible Reason screen is displayed.

Clear Ineligible Reasons - MassGrant

BOSTON UNIVERSITY  
Academic Year 2014-2015

Change Academic Year: Year 2014-2015 ▾

[Citizenship Status](#)

[Prior Bachelors Degree Received](#)

[Answered Yes to Drug Question](#)

[Loan Default and/or Refund Owed on Federal Financial Aid](#)

---

*Note: By default, the current academic year is selected. To clear ineligible reasons for the next academic year, if applicable, select an alternate academic year.*

---

2. Select an ineligible reason and the Clear Ineligible Reasons screen is displayed listing all students ineligible for the selected reason.

Clear Ineligible Reasons  
MassGrant

BOSTON UNIVERSITY  
Academic Year 2014-2015  
Citizenship Status

The students I have selected below and am submitting have resolved all matters concerning their United States citizenship status and are now eligible for Title IV and institutional financial aid for the academic year 2014-2015.

SSN	Name	Address	Citizenship Eligible
088-88-8888	TAN BID	11 BEDFORD ST, LEXINGTON MA	<input type="checkbox"/>
078-78-7878	OLAB BOLA	72 BRAYTON AVENUE, FALL RIVER MA	<input type="checkbox"/>
090-90-9090	GINE CEVEDO	8 WALES ST., DORCHESTER MA	<input type="checkbox"/>
028-28-2828	RICH EAMPONG	4 OAK AVENUE, TYNGSBORO MA	<input type="checkbox"/>

<< Page 1 of 9 >>

SAVE CANCEL

*This is a sample screen for the 'Citizenship Status' ineligible reason only*

3. Select one or more students to clear of the ineligible reason and select [Save].

Note: If multiple pages of students are displayed, select students on any page and then click [Save]; all students selected, regardless of page, will have the ineligible reason cleared.

All students selected to have the ineligible reason cleared will no longer be ineligible for that reason.

# 6 Owe Refund Students

Schools report students who owe a refund on state financial aid. Users can manage these students.

---

## 6.1 Search Owe Refund Students

Users can manage students who owe a refund. Follow these steps:

1. Select MASSGrant then Owe Refund Students from the menu. The Search Owe Refund Students screen is displayed.

The screenshot shows a web interface for searching students. At the top, there is a blue header with the text "School Reported Owe Refund Students" and "Search Owe Refund Students". Below the header, there are three input fields labeled "Last Name", "First Name", and "SSN". At the bottom of the form, there are two buttons: "SEARCH" and "ADD NEW".

Tip: Enter as much information as possible for faster response time.

2. Enter one or more search criteria:
  - 2.1 Full or partial last name
  - 2.2 Full or partial first name
  - 2.3 SSN
3. Click [Search]; students matching your search results are displayed.

---

*Note: School users will only get results back on students attending their school.*

---



**School Reported Owe Refund Students**  
**Search Owe Refund Students**

Last Name   
 First Name   
 SSN

**SEARCH**      **ADD NEW**

Tip: Enter as much information as possible for faster response time.

Search Results					
SSN	Name	Institution	Date Entered	Refund Amount Owed	Refund Status
<a href="#">009-09-0909</a>	JULISSA CABRE	BRISTOL COMMUNITY COLLEGE	8/14/2006	\$358.00	Owe Refund
<a href="#">022-22-2222</a>	JESSICA CABRA	BRISTOL COMMUNITY COLLEGE	4/30/2004	\$72.00	Owe Refund
<a href="#">177-77-7777</a>	Jaqua Abreu	BRISTOL COMMUNITY COLLEGE	2/20/2013	\$0.00	No Refund Owed

### 6.1.1 Update Owe Refund Student

To update a student who owes a refund, follow these steps:

1. From the *Owe Refund Students search results*, select a student. The Update Owe Refund Student screen is displayed.

**Update Owe Refund Student**  
022-22-2222

**First Name**   
**Last Name**   
 Middle Initial   
**Date of Birth**   
**Address**   
 Address 2   
**City**   
**State**    
**Zip Code**   
**Phone Number**   
**Institution**    
**Refund Owed Amount**   
**Refund Status**

2. Edit one or more of the following fields (required fields in **bold**):

2.1 **First Name**

- 2.2 **Last Name**
- 2.3 Middle Initial
- 2.4 Date of Birth
- 2.5 Address
- 2.6 Address2
- 2.7 City
- 2.8 State
- 2.9 Zip Code
- 2.10 Phone Number
- 2.11 Refund Amount Owed
- 2.12 **Refund Status**
  - 2.12.1 Owe Refund
  - 2.12.2 No Refund Owed

3. Click [Save].

The owe refund status is updated and student eligibility is re-determined (if applicable).

### **6.1.2 Add New Owe Refund Student**

To add a new student who owes a refund, follow these steps:

1. *From the Owe Refund Students screen*, select [Add New]. The Insert Owe Refund Student screen is displayed.

## Insert Owe Refund Student

<b>SSN</b>	<input type="text"/>
<b>First Name</b>	<input type="text"/>
<b>Last Name</b>	<input type="text"/>
Middle Initial	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip Code	<input type="text"/>
<b>Institution</b>	<input type="text"/>
Refund Owed Amount	<input type="text"/>

2. Enter the following (required fields in **bold**):

- 2.1 **SSN**
- 2.2 **First Name**
- 2.3 **Last Name**
- 2.4 Middle Initial
- 2.5 Date of Birth
- 2.6 Address
- 2.7 Address2
- 2.8 City
- 2.9 State
- 2.10 Zip Code
- 2.11 Refund Amount Owed

3. Click [Save].

The student is added as owing a refund and student eligibility is re-determined (if applicable).

# No Interest Loan Origination

## 1 NIL Award Info

The NIL Award Info displays the total award amounts allocated and disbursed to the selected school.

### 1.1 View NIL Award Info

Users can view No Interest Loan award information for specific institutions. Follow these steps:

1. Select No Interest Loan Origination Options then NIL Award Info and the NIL Award Info screen is displayed.

**No Interest Loan Award Info**  
ASSUMPTION COLLEGE, 002118-00

**Academic Year 2014-2015**

Change Academic Year: Year 2014 To 2015 ▾

NIL Allocation	185,000	NIL Disbursed	89,500
NIL De-obligated	0	NIL Remaining	6,000
NIL Committed	179,000		

**CLOSE**

The award information displays for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

## 2 School Profile

The School Profile contains school demographic and academic year information for all aid programs.

---

### 2.1 View NIL School Profile

To view the NIL school profile, follow these steps:

1. Select NIL then School Profile from the menu.
2. The NIL School Profile is displayed for the selected school.

The school profile is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

View School Profile

STONEHILL COLLEGE, 002217- 00

Change Academic Year: Year 2014 to 2015

Academic Year 2014 to 2015

School OECODE 002217  
 School Branch 00  
 Vendor ID VC6000157089  
 Tax Identification Number (TIN)  
 Servicing Code 73070  
 School Name STONEHILL COLLEGE  
 Address 320 WASHINGTON ST  
 Address2  
 City EASTON  
 State Massachusetts  
 Zip Code 02357 -  
 Phone Number  
 Fax Number  
 School Type Massachusetts Private 4-year

Program: No Interest Loan

Contact Name Eric Newnum  
 Contact Title Assistant Director for Loans  
 Contact Email Address RGraham@nelnet.net  
 Phone Number 508-565-1076  
 Fax Number 508-565-1426  
 Secondary Contact Name  
 Secondary Contact Title  
 Secondary Contact Email Address  
 Secondary Phone Number  
 Secondary Fax Number  
 Active Yes  
 Allocation 700000  
 De-obligated

Promissory Note Components

Loan Period Begin Date 08/27/2014  
 Loan Period End Date 05/08/2015  
 Disbursement Preference Fall, Spring  
 Fall Disbursement Date 09/15/2014  
 Spring Disbursement Date 01/23/2015  
 Summer Disbursement Date

COMMENTS

UPDATE

TRANSACTION HISTORY

PAYMENT HISTORY

CANCEL

---

## 2.2 Update NIL School Profile

To update the NIL school profile, you must have security level of “Update” or “Administrator” for NIL. Follow these steps:

1. From the NIL School Profile screen, click [Update].

---

*Note: School profiles can only be updated for the current and future academic years.*

---

2. The Update School Profile screen is displayed.
3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 **Contact Name**

- 3.2 **Contact Title**

- 3.3 **Contact Email Address**

- 3.4 **Phone Number**

- 3.5 **Fax Number**

- 3.6 Secondary Contact Name

- 3.7 Secondary Contact Title

- 3.8 Secondary Contact Email Address

- 3.9 Secondary Phone Number

- 3.10 Secondary Fax Number

- 3.11 Promissory Note Components (*only updateable if school is active for the NIL program*):

---

*Note: The Disbursement Preference must be entered first.*

---

- 3.11.1 Loan Period Begin Date

- 3.11.2 Loan Period End Date

- 3.11.3 Disbursement Preference

- 3.11.4 Fall Disbursement Date

- 3.11.5 Spring Disbursement Date

- 3.11.6 Summer Disbursement Date

4. Click [Save].

---

## 2.3 View NIL School Transaction History

The school transaction history displays updates made to the school profile chronologically by academic year. In addition, any comments entered online display in chronological order among the transactions.

To view a school’s Transaction History, follow these steps:

1. From the NIL School Profile screen click [Transaction History]
2. The NIL School Transaction History screen is displayed.

Updates to school demographics are not associated to an academic year; these updates display at the top of the transaction history.

## 2.4 View NIL School Payment History

To view the school's payment history for an aid program, follow these steps:

1. From the NIL School Profile screen click [Payment History]
2. The NIL Payment History screen is displayed.

Payment History								
STONEHILL COLLEGE, 002217-00								
							Change Academic Year	2014-2015 ▾
Academic Year 2014-2015								
Date	Program	Term	Type	Batch Number	Reconciled	Number Of Students	Payment Amount	
11/13/2014	NIL	Fall	Payment	<a href="#">B0120756</a>	Y	5	\$9,000.00	
10/30/2014	NIL	Fall	Payment	<a href="#">B0120601</a>	Y	160	\$270,050.00	
<b>Total:</b>							<b>\$279,050.00</b>	

**CANCEL**

The school payment history is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen

### 2.4.1 View School Payment Batch Details

To view the details of a payment batch for a school, follow these steps:

1. From the School Payment History screen, select a Batch Number.
2. The School Payment Batch Details screen is displayed.

Payment Batch Detail					
STONEHILL COLLEGE, 002217-00					
Batch # B0120756					
11/13/2014					
Name	SSN	Payment Type	Term	Payment Amount	
1. BOUD, ZACHARY	025-00-0000	Payment	Fall	\$2,000.00	
2. GATES, RONDE	032-00-0000	Payment	Fall	\$2,000.00	
3. SAWYER, DOROTHY	022-00-0000	Payment	Fall	\$2,000.00	
4. TORREA, CHRISTAL	013-00-0000	Payment	Fall	\$2,000.00	
5. WOOV, THOMAS	027-00-0000	Payment	Fall	\$1,000.00	
<b>Total:</b>					<b>\$9,000.00</b>

**CLOSE**




---

## 2.5 Add Comment on School Profile

Agency and School users can enter comments for display on the school's Transaction History.

To enter a comment for a school, follow these steps:

1. From the School Profile screen click [Comments].
2. The Add Comments screen is displayed.



3. Enter comment text.
4. Click [Save].

# 3 NIL Promissory Note Creation

## 3.1 Create NIL Promissory Note

Users can create No Interest Loan promissory notes for students.

To create a No Interest Loan Promissory Note, follow these steps:

1. Select No Interest Loan Origination Options then NIL Promissory Note Creation and the NIL Promissory Note Creation – Select Students screen is displayed for the selected school.

**ASSUMPTION COLLEGE**  
**Promissory Note Creation - Select Students**  
**NIL 2014-2015**

**APPLY FILTER**      **REMOVE FILTER**

	SSN	Name
<input type="checkbox"/>	032-33-3333	YAMROT ABER
<input type="checkbox"/>	021-11-1111	JULIANA L. ABRAN
<input type="checkbox"/>	034-33-3333	AMANDA J. ADAM
<input type="checkbox"/>	011-11-1111	TAMRA J. ADAM
<input type="checkbox"/>	021-33-3333	TIMOTHY ADAM
<input type="checkbox"/>	011-11-1111	MELISSA M. ADREA
<input type="checkbox"/>	016-33-3333	DAVID A. AFFU
<input type="checkbox"/>	011-11-1111	JAMES AGBA
<input type="checkbox"/>	022-33-3333	CHINEYE AGON
<input type="checkbox"/>	411-11-1111	SAMIN AKBARI
<input type="checkbox"/>	034-33-3333	KAITLYN L. AKER
<input type="checkbox"/>	011-11-1111	MARY M. ALDRI
<input type="checkbox"/>	581-33-3333	JANET ALFAR
<input type="checkbox"/>	025-78-5590	BRAYLIN M. ALL
<input type="checkbox"/>	020-33-3333	JEREMY ALLEY

<<      Page 1 of 50      >>

**OK**      **CANCEL**

2. Select one or more students for promissory note creation and click [OK].

*Note: Students may be filtered by last name. In addition, if multiple pages of students are displayed, select students for promissory note creation on any page and then click [OK]; all students selected, regardless of page, will have a promissory note created.*

3. The Promissory Note Creation screen will display for the first student selected.

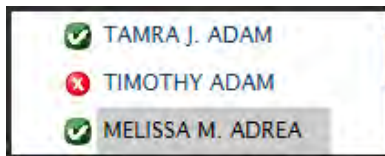
**NIL Promissory Note Creation**  
 Academic Year 2014-2015

Student Information	
<div style="border: 1px solid #ccc; padding: 2px;"> <input checked="" type="checkbox"/> TAMRA J. ADAM  <input type="checkbox"/> TIMOTHY ADAM  <input type="checkbox"/> MELISSA M. ADREA           </div>	Name TAMRA J. ADAM SSN 011-11-1111 Address 13 PROSPECT AVENUE City, State, Zip QUINCY, MA 02170 Home Phone Number (222)222-2222 Email Address email@email.com Dependency Status Dependent MASSAid ID 18589
Promissory Note Information	
Loan Amount from 1000 to 4000 Loan Period Begin Date 9 / 2 / 2014 Loan Period End Date 6 / 1 / 2015 Graduation Date / /	Disbursement Preference Fall, Spring Fall Disbursement Date 9 / 16 / 2014 Spring Disbursement Date 1 / 29 / 2015
School Certification for FAO Information	
FAO Name Ellen Smith FAO Title Financial Aid Counselor Phone Number for PNote (222)222-2222 Phone Number for OFSA to Contact School Address for PNote 500 SALISBURY STREET School City for PNote WORCESTER School State for PNote Massachusetts School Zip for PNote 01609 - 0005	
<input type="button" value="PREVIOUS"/>	<input type="button" value="NEXT"/>
When [Create PNotes] is selected, all students with a green check will have a promissory note created. You will have the ability to review/remove students prior to finalizing the PNotes and printing.	
<input type="button" value="CREATE PNOTES"/>	

4. Enter/edit one or more of the following fields (fields in **bold** are required):
  - 4.1 **Home Phone Number**
  - 4.2 **Email Address**
  - 4.3 **Loan Amount**
  - 4.4 **Disbursement Preference**
  - 4.5 **Loan Period Begin Date**
  - 4.6 **Loan Period End Date**
  - 4.7 Fall Disbursement Date (required based on Disbursement Preference selected)
  - 4.8 Spring Disbursement Date (required based on Disbursement Preference selected)
  - 4.9 Summer Disbursement Date (required based on Disbursement Preference selected)

- 4.10 **Graduation Date**
  - 4.11 **FAO Name**
  - 4.12 **FAO Title**
  - 4.13 **Phone Number for PNote**
  - 4.14 Phone Number for OSFA to Contact
  - 4.15 **School Address for PNote**
  - 4.16 **School City for PNote**
  - 4.17 **School State for PNote**
  - 4.18 **School Zip for**
  - 4.19 **PNote**
5. Click [Next].

As the user selects [Next], the existing record is checked for errors. If the record is error free, a green check will display next to the students name and the next student will display. If the record is not error free, the errors will display and a red X will display next to the student name until the errors are corrected.



6. When all students are ready, click [Create PNotes].
7. The Promissory Note Creation – Summary Screen will display. All students with a green check will be selected for promissory note creation; students with a red X will be disabled.

ASSUMPTION COLLEGE Promissory Note Creation - Summary Screen NIL 2014-2015			
	SSN	Name	Loan Amount
<input checked="" type="checkbox"/>	011-11-1111	TAMRA J. ADAM	\$1,000
<input type="checkbox"/>	021-88-8888	TIMOTHY ADAM	\$
<input checked="" type="checkbox"/>	011-11-1111	MELISSA M. ADREA	\$1,000

Pending records that contain one or more errors are unavailable for selection. To correct these errors before proceeding, select [Cancel] to return to the prior screen and then select the students you wish to correct.



8. Click [OK].

Promissory notes are created for all selected students. The original note, school copy and student copy of the Promissory Note and the Loan Offer are generated as a .PDF.

# Early Childhood Educators Scholarship

## 1 Award Rules

The Award Rules contain the annual award amounts, cutoff values, and cutoff dates necessary to administer each aid program.

### 1.1 View ECE Award Rules

To view the award rules, follow these steps:

1. Select Early Childhood Educators Scholarship then Award Rules and the Award Rules screen is displayed.

**Award Rules**  
**Early Childhood Educators Scholarship**  
**Academic Year 2014 - 2015**

Change Academic Year: Year 2014 To 2015 ▾

# Days to Clear Ineligible Reasons	21	Online Application Start Date	04/01/2014
		Application Deadline Date	12/31/2014
		Fall Certification Available	08/01/2014
		Spring Certification Available	01/02/2015
		Summer 1 Certification Available	05/01/2015
		Summer 2 Certification Available	06/01/2015
		Program Email Address	jszymaniak@osfa.mass.edu

[VIEW MAJORS](#) [VIEW PAYMENT TABLE](#)

The award rules are displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

### 1.2 View ECE Majors

The ECE majors table displays majors that are active for the program.

To view the ECE majors, follow these steps:

1. From the ECE Award Rules screen, click [View Majors].
2. The ECE Majors screen is displayed.

Majors Early Childhood Educators Scholarship 2014 - 2015	
Major	Active
Child Development	Yes <input type="checkbox"/>
Child Guidance	Yes <input type="checkbox"/>
Child Psychology	Yes <input type="checkbox"/>
Early Childhood Education	Yes <input type="checkbox"/>
Elementary Education	Yes <input type="checkbox"/>
Human Services	Yes <input type="checkbox"/>
Interdisciplinary Studies	Yes <input type="checkbox"/>
Physical Education	Yes <input type="checkbox"/>
Psychology	Yes <input type="checkbox"/>
Recreation	Yes <input type="checkbox"/>
Social Work	Yes <input type="checkbox"/>
Sociology	Yes <input type="checkbox"/>
The Arts	Yes <input type="checkbox"/>

[RETURN TO AWARD RULES](#)

The ECE majors are displayed for the academic year from which you viewed the Award Rules. To view an alternate academic year, return to the Award Rules screen and select the year in the Change Academic Year field at the top of the screen then select [View Majors].

## 1.3 View ECE Payment Table

The ECE payment table displays the annual award amount per credit that will be awarded to students based on school type.

To view the ECE payment table, follow these steps:

1. From the ECE Award Rules screen, click [View Payment Table].
2. The ECE Payment Table screen is displayed.

Early Childhood Educators Scholarship Payment Table Academic Year 2014 - 2015						
All fields must be whole numbers						
Award Amounts						
	Amount Per Credit	Max Fall Amount	Max Spring Amount	Max Summer 1 Amount	Max Summer 2 Amount	Max Annual Amount
Community College	250	1500	750	0	0	2250
Private 2-Year	500	3000	1500	0	0	4500
Private 2-Year Special	250	1500	750	0	0	2250
Private 4-Year	500	3000	1500	0	0	4500
Private 5-Year	500	3000	1500	0	0	4500
State College	400	2400	1200	0	0	3600
State University	500	3000	1500	0	0	4500

[RETURN TO AWARD RULES](#)

*Note: This is a sample Payment Table for the ECE program; actual award amounts may vary.*

The ECE Payment Table is displayed for the academic year from which you viewed the Award Rules. To view an alternate academic year, return to the Award Rules screen and select the year in the Change Academic Year field at the top of the screen then select [View Payment Table].

## 2 School Profile

The School Profile contains school demographic and academic year information for all aid programs.

---

### 2.1 View ECE School Profile

To view the ECE school profile, follow these steps:

1. Select Early Childhood Educators Scholarship then School Profile from the menu.
2. The ECE School Profile is displayed for the selected school.

The school profile is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.



**View School Profile**  
**BOSTON COLLEGE, 002128- 00**

Change Academic Year: Year 2014 to 2015

**Academic Year**  
**2014 to 2015**

School OECODE	002128
School Branch	00
Vendor ID	VC6000156860
Tax Identification Number (TIN)	42103545
School Name	BOSTON COLLEGE
Address	LYONS HALL,
Address2	STUDENT SER, 140 COMMONWEALTH AVENUE
City	CHESTNUT HILL
State	Massachusetts
Zip Code	02467 - 0000
Phone Number	
Fax Number	
School Type	Massachusetts Private 4-year

**Program: Early Childhood Educators Scholarship**

Contact Name	John Doe
Contact Title	Administrator
Contact Email Address	jdoe@email.com
Phone Number	222-222-2222
Fax Number	555-555-5555
Secondary Contact Name	
Secondary Contact Title	
Secondary Contact Email Address	
Secondary Phone Number	
Secondary Fax Number	
Active	Yes
Fall Certification Duration	90
Fall Reinstated Certification Duration	20
Spring Certification Duration	60
Spring Reinstated Certification Duration	20
Summer 1 Certification Duration	60
Summer 1 Reinstated Certification Duration	20
Summer 2 Certification Duration	60
Summer 2 Reinstated Certification Duration	20
Reconciliation Duration	30
Hold Payments	No

## 2.2 Update ECE School Profile

To update the ECE school profile, you must have security level of “Update” or “Administrator” for ECE. Follow these steps:

1. From the ECE School Profile screen, click [Update].

---

*Note: School profiles can only be updated for the current and future academic years.*

---

2. The Update School Profile screen is displayed.
3. Edit one or more of the following fields (fields in **bold** are required):
  - 3.1 Contact Name
  - 3.2 Contact Title
  - 3.3 Contact Email Address
  - 3.4 Phone Number
  - 3.5 Fax Number
  - 3.6 Secondary Contact Name
  - 3.7 Secondary Contact Title
  - 3.8 Secondary Contact Email Address
  - 3.9 Secondary Phone Number
  - 3.10 Secondary Fax Number
4. Click [Save].

---

## 2.3 View ECE School Transaction History

The school transaction history displays updates made to the school profile chronologically by academic year. In addition, any comments entered online display in chronological order among the transactions.

To view a school's Transaction History, follow these steps:

1. From the ECE School Profile screen click [Transaction History]
2. The School Transaction History screen is displayed.

Updates to school demographics are not associated to an academic year; these updates display at the top of the transaction history.

---

## 2.4 View ECE School Payment History

To view the school's payment history for an aid program, follow these steps:

1. From the ECE School Profile screen click [Payment History]
2. The Payment History screen is displayed.

**Payment History**  
QUINCY COLLEGE, 002205-00

Current Balance: \$0.00

Change Academic Year

**Academic Year 2013-2014**

Date	Program	Term	Type	Batch Number	Reconciled	Number Of Students	Payment Amount
03/28/2014	ECE	Spring	Payment	<a href="#">B0113679</a>	Y	4	\$3,000.00
10/09/2013	ECE	Fall	Payment	<a href="#">B0106485</a>	Y	6	\$6,000.00
<b>Total:</b>							<b>\$9,000.00</b>

**CANCEL**

The school payment history is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen

---

*Note: The Current Balance represents any outstanding balance between the school and OSFA. If the Current Balance is positive, monies are owed to the school from OSFA. If the Current Balance is negative, monies are owed to OSFA from the school.*

---

### 2.4.1 View School Payment Batch Details

To view the details of a payment batch for a school, follow these steps:

1. From the School Payment History screen, select a Batch Number.
2. The School Payment Batch Details screen is displayed.

**Payment Batch Detail**  
QUINCY COLLEGE, 002205-00  
Batch # B0113679  
03/28/2014

Name	SSN	Payment Type	Term	Payment Amount
1. CONNELL, MARY	022-22-2222	Payment	Spring	\$750.00
2. FRANKLIN, JENNIFER	012-66-6666	Payment	Spring	\$750.00
3. LAU, AMELIA	018-22-2222	Payment	Spring	\$750.00
4. SULLIVAN, LAURI	024-66-6666	Payment	Spring	\$750.00
<b>Total:</b>				<b>\$3,000.00</b>

**CLOSE**

---

*Note: If there is a Current Balance for a school when the payment batch is created, the amount is netted with the payment amount. If this occurs, the 'Total Sent to School' will differ from the 'Total' of the payment batch.*

---

---

## 2.5 Add Comment on School Profile

Agency and School users can enter comments for display on the school's Transaction History.

To enter a comment for a school, follow these steps:

1. From the School Profile screen click [Comments].
2. The Add Comments screen is displayed.



3. Enter comment text.
4. Click [Save].

# 3 Certification

School users must certify all student awards in order for the students to be paid.

---

## 3.1 ECE Online Certification

Users can certify students through the online certification roster. Follow these steps:

1. Select Early Childhood Educators Scholarship then Certification from the menu. The Select Academic Term screen is displayed.

Select Academic Term

Spring ▼

CERTIFICATION ROSTER

2. Select a term.

---

*Note: A term must be available for certification (per the Award Rules screen) in order to be selected. The screen will default to the most recent term available for certification.*

---

3. Click [Certification Roster] and the Online Certification Roster screen is displayed.

BAY PATH COLLEGE  
2014-2015 Spring Certification Roster  
Early Childhood Educators Scholarship  
19 Students Remaining to Certify

Filter:

APPLY FILTER

REMOVE FILTER

Page

Annual Max Amount Remaining: \$1,500.00

Max Amount Per Credit: \$500.00

Max Amount Per Term: \$1,500.00

Certify	Name	SSN	# Days Remaining to Certify	Reported Credit Hours	Actual Credit Hours	Current Award Amount	Adjusted Award Amount	Additional Options
<input type="radio"/> Pending <input checked="" type="radio"/> Yes <input type="radio"/> No	SHANNON M. ATTON	016-66-6666	60	12	<input type="text"/> *Required	\$1,500.00		<input type="checkbox"/> Reduce Award <input type="text"/> \$ <input type="text"/>
<input type="radio"/> Pending <input type="radio"/> Yes <input checked="" type="radio"/> No	ELIZABETH H. AURILIO	013-66-6666	60	18	<input type="text"/> *Required	\$1,500.00		<input checked="" type="checkbox"/> No Award <input type="text"/> \$ <input type="text"/> 0.00 *Required
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No	KALYN J. CORNELIUS	024-66-6666	60	15	<input type="text"/>	\$1,500.00		
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No	CRYSTAL T. LAROCCO	123-66-6666	60	12	<input type="text"/>	\$1,500.00		

1 2

I certify that the students who are indicated as eligible for payment of an Early Childhood Educators Scholarship, have completed all verification and eligibility requirements, including citizenship and academic progress, as specified in the program guidelines.

SAVE

CANCEL

4. Enter/select the following:

4.1 Certification indicator

4.1.1 Pending (default) – student will remain on roster if selected

4.1.2 Yes

4.1.3 No

---

*Note: On the Fall Certification Roster, selecting 'No' will cancel the Fall and Spring award.*

---

4.2 Actual Credit Hours

4.3 If 'Yes' is selected, additional options display

4.3.1 Reduce Award (checkbox)

---

*Note: If the Reduce Award checkbox is selected, the Reduce Award Reason and Amount fields are enabled and required.*

---

4.3.2 Reduce Award Reason

4.3.2.1 Overaward

4.3.2.2 Alternate EEC Funding

4.3.2.3 Other

4.3.3 Amount

4.4 If 'No' is selected, additional options display

4.4.1 No Award – selected

4.4.2 No Award Reason

4.4.2.1 Alternate EEC Funding

4.4.2.2 Not Enrolled

- 4.4.2.3 Not Registered
- 4.4.2.4 Not Matriculated
- 4.4.2.5 Unsatisfactory Progress
- 4.4.2.6 Overaward
- 4.4.2.7 Leave of Absence
- 4.4.2.8 Verification Incomplete
- 4.4.2.9 Other

4.4.3 Amount – prefilled to \$0

5. Click [Save].

All payment records for students certified to receive an award will be updated to “Ready to Pay” and will be available for payment by the Agency.

# Paraprofessional Teacher Preparation Grant

## 1 Award Rules

The Award Rules contain the annual award amounts, cutoff values, and cutoff dates necessary to administer each aid program.

### 1.1 View PTPG Award Rules

To view the award rules, follow these steps:

1. Select Paraprofessional Teacher Preparation Grant then Award Rules and the Award Rules screen is displayed.

**Award Rules**  
**Paraprofessional Teacher Preparation Grant**

**Academic Year 2014 - 2015**

Change Academic Year: Year 2014 To 2015

# Days to Clear Ineligible Reasons	21	Online Application Start Date	04/01/2014
		Application Deadline Date	06/01/2014
		Fall Certification Available	08/01/2014
		Spring Certification Available	01/02/2015
		Summer 1 Certification Available	05/01/2015
		Summer 2 Certification Available	06/01/2015
		Program Email Address	jszymaniak@osfa.mass.edu

[VIEW MAJORS](#) [VIEW PAYMENT TABLE](#)

The award rules are displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

### 1.2 View PTPG Majors

The PTPG majors table displays majors that are active for the program.

To view the PTPG majors, follow these steps:



1. From the PTPG Award Rules screen, click [View Majors].
2. The PTPG Majors screen is displayed.

Majors Paraprofessional Teacher Preparation Grant 2014 - 2015	
Major	Active
Biology	Yes <input type="checkbox"/>
Bridge to Teaching	Yes <input type="checkbox"/>
Business	Yes <input type="checkbox"/>
Visual Art	Yes <input type="checkbox"/>

**RETURN TO AWARD RULES**

The PTPG majors are displayed for the academic year from which you viewed the Award Rules. To view an alternate academic year, return to the Award Rules screen and select the year in the Change Academic Year field at the top of the screen then select [View Majors].

### 1.3 View PTPG Payment Table

The PTPG payment table displays the annual award amount per credit that will be awarded to students based on school type.

To view the PTPG payment table, follow these steps:

1. From the PTPG Award Rules screen, click [View Payment Table].
2. The PTPG Payment Table screen is displayed.

Paraprofessional Teacher Preparation Grant						
Payment Table						
Academic Year 2014 - 2015						
All fields must be whole numbers						
Award Amounts						
	Amount Per Credit	Max Fall Amount	Max Spring Amount	Max Summer 1 Amount	Max Summer 2 Amount	Max Annual Amount
Community College	250	1500	1500	0	0	3000
Private 2-Year	625	3750	3750	0	0	7500
Private 2-Year Special	625	3750	3750	0	0	7500
Private 4-Year	625	3750	3750	0	0	7500
Private 5-Year	625	3750	3750	0	0	7500
State College	450	2700	2700	0	0	5400
State University	625	3750	3750	0	0	7500

[RETURN TO AWARD RULES](#)

*Note: This is a sample Payment Table for the PTPG program; actual award amounts may vary.*

The PTPG Payment Table is displayed for the academic year from which you viewed the Award Rules. To view an alternate academic year, return to the Award Rules screen and select the year in the Change Academic Year field at the top of the screen then select [View Payment Table].

## 2 School Profile

The School Profile contains school demographic and academic year information for all aid programs.

---

### 2.1 View PTPG School Profile

To view the PTPG school profile, follow these steps:

1. Select Paraprofessional Teacher Preparation Grant then School Profile from the menu.
2. The PTPG School Profile is displayed for the selected school.

The school profile is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

**View School Profile**  
**BOSTON COLLEGE, 002128- 00**

Change Academic Year: Year 2014 to 2015

**Academic Year**  
**2014 to 2015**

School OECODE	002128
School Branch	00
Vendor ID	VC6000156860
Tax Identification Number (TIN)	42103545
School Name	BOSTON COLLEGE
Address	LYONS HALL,
Address2	STUDENT SER,140 COMMONWEALTH AVENUE
City	CHESTNUT HILL
State	Massachusetts
Zip Code	02467 - 0000
Phone Number	
Fax Number	
School Type	Massachusetts Private 4-year

**Program: Paraprofessional Teacher Preparation Grant**

Contact Name	Jane Doe
Contact Title	Administrator
Contact Email Address	email@email.com
Phone Number	333-333-3333
Fax Number	444-444-4444
Secondary Contact Name	
Secondary Contact Title	
Secondary Contact Email Address	
Secondary Phone Number	
Secondary Fax Number	
Active	No
Fall Certification Duration	60
Fall Reinstated Certification Duration	20
Spring Certification Duration	60
Spring Reinstated Certification Duration	20
Summer 1 Certification Duration	60
Summer 1 Reinstated Certification Duration	20
Summer 2 Certification Duration	60
Summer 2 Reinstated Certification Duration	20
Reconciliation Duration	30
Hold Payments	No

---

## 2.2 Update PTPG School Profile

To update the PTPG school profile, you must have security level of “Update” or “Administrator” for PTPG. Follow these steps:

1. From the PTPG School Profile screen, click [Update].

---

*Note: School profiles can only be updated for the current and future academic years.*

---

2. The Update School Profile screen is displayed.
3. Edit one or more of the following fields (fields in **bold** are required):
  - 3.1 Contact Name
  - 3.2 Contact Title
  - 3.3 Contact Email Address
  - 3.4 Phone Number
  - 3.5 Fax Number
  - 3.6 Secondary Contact Name
  - 3.7 Secondary Contact Title
  - 3.8 Secondary Contact Email Address
  - 3.9 Secondary Phone Number
  - 3.10 Secondary Fax Number
4. Click [Save].

---

## 2.3 View PTPG School Transaction History

The school transaction history displays updates made to the school profile chronologically by academic year. In addition, any comments entered online display in chronological order among the transactions.

To view a school’s Transaction History, follow these steps:

1. From the PTPG School Profile screen click [Transaction History]
2. The School Transaction History screen is displayed.

Updates to school demographics are not associated to an academic year; these updates display at the top of the transaction history.

---

## 2.4 View PTPG School Payment History

To view the school’s payment history for an aid program, follow these steps:

1. From the PTPG School Profile screen click [Payment History]
2. The Payment History screen is displayed.

Payment History SPRINGFIELD COLLEGE, 002211-00							
Current Balance: \$0.00				Change Academic Year 2014-2015			
Academic Year 2014-2015							
Date	Program	Term	Type	Batch Number	Reconciled	Number Of Students	Payment Amount
10/21/2014	PTPG	Fall	Payment	<a href="#">B0120542</a>	Y	2	\$7,500.00
<b>Total:</b>							<b>\$7,500.00</b>

**CANCEL**

The school payment history is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen

*Note: The Current Balance represents any outstanding balance between the school and OSFA. If the Current Balance is positive, monies are owed to the school from OSFA. If the Current Balance is negative, monies are owed to OSFA from the school.*

### 2.4.1 View School Payment Batch Details

To view the details of a payment batch for a school, follow these steps:

1. From the School Payment History screen, select a Batch Number.
2. The School Payment Batch Details screen is displayed.

Payment Batch Detail SPRINGFIELD COLLEGE, 002211-00 Batch # B0120542 10/21/2014				
Name	SSN	Payment Type	Term	Payment Amount
1. CHIARO, JILLIAN	016-66-6666	Payment	Fall	\$3,750.00
2. GARCIA, ARMAN Y	577-77-7777	Payment	Fall	\$3,750.00
<b>Total:</b>				<b>\$7,500.00</b>

**CLOSE**

*Note: If there is a Current Balance for a school when the payment batch is created, the amount is netted with the payment amount. If this occurs, the 'Total Sent to School' will differ from the 'Total' of the payment batch.*

## 2.5 Add Comment on School Profile

Agency and School users can enter comments for display on the school's Transaction History.

To enter a comment for a school, follow these steps:

1. From the School Profile screen click [Comments].
2. The Add Comments screen is displayed.

**Add Comment**

**SAVE****CANCEL**

3. Enter comment text.
4. Click [Save].

# 3 Certification

School users must certify all student awards in order for the students to be paid.

---

## 3.1 PTPG Online Certification

Users can certify students through the online certification roster. Follow these steps:

1. Select Paraprofessional Teacher Preparation Grant then Certification from the menu. The Select Academic Term screen is displayed.



Select Academic Term

Spring ▼



CERTIFICATION ROSTER

2. Select a term.

---

*Note: A term must be available for certification (per the Award Rules screen) in order to be selected. The screen will default to the most recent term available for certification.*

---

3. Click [Certification Roster] and the Online Certification Roster screen is displayed.



UNIVERSITY OF MASSACHUSETTS-DARTMOUTH  
2014-2015 Spring Certification Roster  
Paraprofessional Teacher Preparation Grant  
7 Students Remaining to Certify

Filter:

APPLY FILTER

REMOVE FILTER

Page

Annual Max Amount Remaining: \$3,750.00

Max Amount Per Credit: \$625.00

Max Amount Per Term: \$3,750.00

Certify	Name	SSN	# Days Remaining to Certify	Reported Credit Hours	Actual Credit Hours	Current Award Amount	Adjusted Award Amount	Additional Options
<input type="radio"/> Pending <input checked="" type="radio"/> Yes <input type="radio"/> No	EMANUEL ALV	060-60-6060	63	12	<input type="checkbox"/> <i>*Required</i>	\$3,750.00		<input type="checkbox"/> Reduce Award <input type="text" value=""/> \$ <input type="text" value=""/>
<input type="radio"/> Pending <input type="radio"/> Yes <input checked="" type="radio"/> No	MONICA BERES	036-99-9999	63	9	<input type="checkbox"/> <i>*Required</i>	\$3,750.00		<input checked="" type="checkbox"/> No Award <input type="text" value=""/> \$ <input type="text" value=""/> <i>*Required</i>
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No	MARIA SANTOS	010-60-6060	63	9	<input type="checkbox"/>	\$3,750.00		
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No	ALISON A. MESQUIT	099-99-9999	63	6	<input type="checkbox"/>	\$3,750.00		
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No	FANNY NIEVE	072-60-6060	63	9	<input type="checkbox"/>	\$3,750.00		
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No	CONNIE S. ROOT	399-99-9999	63	6	<input type="checkbox"/>	\$3,750.00		
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No	RONALD VALLIERE	032-60-6060	63	6	<input type="checkbox"/>	\$3,750.00		

I certify that the students who are indicated as eligible for payment of a Paraprofessional Teacher Preparation Grant, have completed all verification and eligibility requirements, including citizenship and academic progress, as specified in the program guidelines.

SAVE

CANCEL

4. Enter/select the following:

4.1 Certification indicator

4.1.1 Pending (default) – student will remain on roster if selected

4.1.2 Yes

4.1.3 No

---

*Note: On the Fall Certification Roster, selecting 'No' will cancel the Fall and Spring award.*

---

4.2 Actual Credit Hours

4.3 If 'Yes' is selected, additional options display

4.3.1 Reduce Award (checkbox)

---

*Note: If the Reduce Award checkbox is selected, the Reduce Award Reason and Amount fields are enabled and required.*

---

4.3.2 Reduce Award Reason

4.3.2.1 Overaward

4.3.2.2 Alternate PTPG Funding

4.3.2.3 Other

4.3.3 Amount

4.4 If 'No' is selected, additional options display

4.4.1 No Award – selected

4.4.2 No Award Reason

4.4.2.1 Alternate PTPG Funding

4.4.2.2 Not Enrolled

- 4.4.2.3 Not Registered
- 4.4.2.4 Not Matriculated
- 4.4.2.5 Unsatisfactory Progress
- 4.4.2.6 Overaward
- 4.4.2.7 Leave of Absence
- 4.4.2.8 Verification Incomplete
- 4.4.2.9 Other

4.4.3 Amount – prefilled to \$0

5. Click [Save].

All payment records for students certified to receive an award will be updated to “Ready to Pay” and will be available for payment by the Agency.

# GEAR UP Scholarship

## 1 Award Rules

The Award Rules contain the annual award amounts, cutoff values, and cutoff dates necessary to administer each aid program.

### 1.1 View GEAR UP Award Rules

To view the award rules, follow these steps:

1. Select GEAR UP Scholarship then Award Rules and the Award Rules screen is displayed.

The screenshot shows the 'Award Rules' screen for the 'GEAR UP Scholarship' for the 'Academic Year 2014 - 2015'. At the top, there is a header with the text 'Award Rules' and 'GEAR UP Scholarship'. Below this is a dark blue bar with the text 'Academic Year 2014 - 2015'. Underneath, there is a 'Change Academic Year:' label followed by a dropdown menu currently set to 'Year 2014 To 2015'. The main content area is divided into two columns. The left column contains a box labeled 'Pell/MASSGrant EFC Cutoff' with the value '5,157'. The right column contains a list of dates and addresses: 'Submit Financial Data Available Date' (07/01/2014), 'Fall Certification Available' (09/09/2014), 'Spring Certification Available' (01/12/2015), and 'Program Email Address' (rbrun@osfa.mass.edu). At the bottom center, there is a dark blue button with the text 'VIEW PAYMENT TABLE'.

The award rules are displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

### 1.2 View GEAR UP Payment Table

The GEAR UP payment table displays the annual award amount that will be awarded to students based on enrollment status.

To view the GEAR UP payment table, follow these steps:

1. From the GEAR UP Award Rules screen, click [View Payment Table].
2. The GEAR UP Payment Table screen is displayed.

GEAR UP Scholarship			
Payment Table			
Academic Year 2014 - 2015			
Award Amounts			
All fields must be whole numbers			
	Fall	Spring	Total
Full-Time	500	500	1000
Three-Quarter Time	450	450	900
Half-Time or Less	400	400	800

[RETURN TO AWARD RULES](#)

*Note: This is a sample Payment Table for the GEAR UP program; actual award amounts may vary.*

The GEAR UP Payment Table is displayed for the academic year from which you viewed the Award Rules. To view an alternate academic year, return to the Award Rules screen and select the year in the Change Academic Year field at the top of the screen then select [View Payment Table].

## 2 School Profile

The School Profile contains school demographic and academic year information for all aid programs.

---

### 2.1 View GEAR UP School Profile

To view the GEAR UP school profile, follow these steps:

1. Select GEAR UP Scholarship then School Profile from the menu.
2. The GEAR UP School Profile is displayed for the selected school.

The school profile is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

**View School Profile**  
**BABSON COLLEGE, 002121- 00**

Change Academic Year: Year 2014 to 2015

**Academic Year**  
**2014 to 2015**

School OECODE	002121
School Branch	00
Vendor ID	VC6000156859
Tax Identification Number (TIN)	
School Name	BABSON COLLEGE
Address	231 FOREST STREET
Address2	
City	BABSON PARK
State	Massachusetts
Zip Code	02457 - 0310
Phone Number	
Fax Number	
School Type	Massachusetts Private 4-year

**Program: GEAR UP Scholarship**

Contact Name	John Smith
Contact Title	Administrator
Contact Email Address	email@email.com
Phone Number	222-222-2222
Fax Number	333-333-3333
Secondary Contact Name	
Secondary Contact Title	
Secondary Contact Email Address	
Secondary Phone Number	
Secondary Fax Number	
Active	Yes
Fall Certification Duration	300
Fall Reinstated Certification Duration	300
Spring Certification Duration	150
Spring Reinstated Certification Duration	150
Reconciliation Duration	30
Hold Payments	No

## 2.2 Update GEAR UP School Profile

To update the GEAR UP school profile, you must have security level of “Update” or “Administrator” for GEAR UP. Follow these steps:

1. From the GEAR UP School Profile screen, click [Update].

*Note: School profiles can only be updated for the current and future academic years.*

2. The Update School Profile screen is displayed.
  3. Edit one or more of the following fields (fields in **bold** are required):
    - 3.1 Contact Name
    - 3.2 Contact Title
    - 3.3 Contact Email Address
    - 3.4 Phone Number
    - 3.5 Fax Number
    - 3.6 Secondary Contact Name
    - 3.7 Secondary Contact Title
    - 3.8 Secondary Contact Email Address
    - 3.9 Secondary Phone Number
    - 3.10 Secondary Fax Number
  4. Click [Save].
- 

## 2.3 View GEAR UP School Transaction History

The school transaction history displays updates made to the school profile chronologically by academic year. In addition, any comments entered online display in chronological order among the transactions.

To view a school's Transaction History, follow these steps:

1. From the GEAR UP School Profile screen click [Transaction History]
2. The School Transaction History screen is displayed.

Updates to school demographics are not associated to an academic year; these updates display at the top of the transaction history.

---

## 2.4 View GEAR UP School Payment History

To view the school's payment history for an aid program, follow these steps:

1. From the GEAR UP School Profile screen click [Payment History]
2. The Payment History screen is displayed.

**Payment History**  
NORTHERN ESSEX COMMUNITY COLLEGE, 002174-00

Current Balance: \$0.00

Change Academic Year  ▼

Academic Year 2014-2015							
Date	Program	Term	Type	Batch Number	Reconciled	Number Of Students	Payment Amount
11/20/2014	Gear Up	Fall	Payment	<a href="#">B0120822</a>	Y	1	\$450.00
11/14/2014	Gear Up	Fall	Payment	<a href="#">B0120780</a>	Y	22	\$10,250.00
11/06/2014	Gear Up	Fall	Adjustment	<a href="#">B0120498-B0120707</a>		1	(\$450.00)
10/31/2014	Gear Up	Fall	Payment	<a href="#">B0120631</a>	Y	4	\$1,850.00
10/17/2014	Gear Up	Fall	Payment	<a href="#">B0120498</a>	Y	183	\$84,300.00
10/03/2014	Gear Up	Fall	Payment	<a href="#">B0120404</a>	Y	15	\$6,850.00
<b>Total:</b>							<b>\$103,250.00</b>

**CANCEL**

The school payment history is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen

---

*Note: The Current Balance represents any outstanding balance between the school and OSFA. If the Current Balance is positive, monies are owed to the school from OSFA. If the Current Balance is negative, monies are owed to OSFA from the school.*

---

### 2.4.1 View School Payment Batch Details

To view the details of a payment batch for a school, follow these steps:

1. From the School Payment History screen, select a Batch Number.
2. The School Payment Batch Details screen is displayed.

Payment Batch Detail					
NORTHERN ESSEX COMMUNITY COLLEGE, 002174-00					
Batch # B0120631					
10/31/2014					
Name	SSN	Payment Type	Term	Payment Amount	
1. LOPEZ, SIRENA	032-50-5050	Payment	Fall	\$450.00	
2. MEJIA, LUIS	102-88-8888	Payment	Fall	\$500.00	
3. RODRIGUEZ, RANGEL	550-50-5050	Payment	Fall	\$500.00	
4. ROSARIO, GENE	016-88-8888	Payment	Fall	\$400.00	
<b>Total:</b>					<b>\$1,850.00</b>

**CLOSE**

---

*Note: If there is a Current Balance for a school when the payment batch is created, the amount is netted with the payment amount. If this occurs, the 'Total Sent to School' will differ from the 'Total' of the payment batch.*

---



---

## 2.5 Add Comment on School Profile

Agency and School users can enter comments for display on the school's Transaction History.

To enter a comment for a school, follow these steps:

1. From the School Profile screen click [Comments].
2. The Add Comments screen is displayed.



3. Enter comment text.
4. Click [Save].

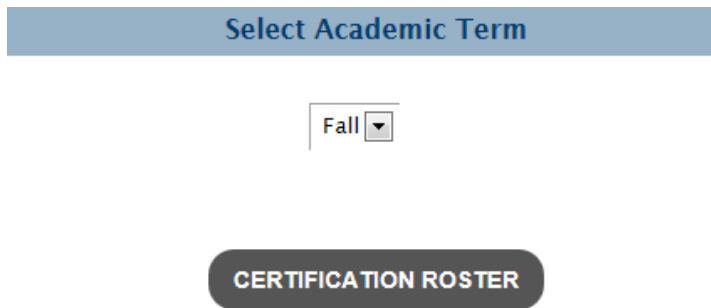
# 3 Certification

School users must certify all student awards in order for the students to be paid.

## 3.1 GEAR UP Online Certification

Users can certify students through the online certification roster. Follow these steps:

1. Select GEAR UP Scholarship then Certification from the menu. The Select Academic Term screen is displayed.



2. Select a term.

*Note: A term must be available for certification (per the Award Rules screen) in order to be selected. The screen will default to the most recent term available for certification.*

3. Click [Certification Roster] and the Online Certification Roster screen is displayed.

Certify	Name	SSN	# Days Remaining to Certify	Enrollment Status	Current Award Amount	Additional Options
<input type="radio"/> Pending <input checked="" type="radio"/> Yes <input type="radio"/> No	MICAELA ADORNO	034-11-1111	203	FullTime	\$325.00	<input type="checkbox"/> Reduce Award <input type="text" value=""/> \$ <input type="text" value=""/>
<input type="radio"/> Pending <input type="radio"/> Yes <input checked="" type="radio"/> No	SARA M. DESTROMP	015-96-9696	237	FullTime	\$25.00	<input checked="" type="checkbox"/> No Award <input type="text" value=""/> \$ <input type="text" value="0.00"/> *Required
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No	SHEY T. MCABEE	025-11-1111	244	LessHT	\$275.00	
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No	AMANDA RIVERA	023-96-9696	244	3/4Time	\$450.00	

I certify that the students who are indicated as eligible for payment of a GEAR UP Scholarship, have completed all verification and eligibility requirements as specified in the program guidelines.

4. Enter/select the following:

4.1 Certification indicator

- 4.1.1 Pending (default) – student will remain on roster if selected
- 4.1.2 Yes
- 4.1.3 No

---

*Note: On the Fall Certification Roster, selecting 'No' will cancel the Fall and Spring award.*

---

4.2 If 'Yes' is selected, additional options display

- 4.2.1 Reduce Award (checkbox)
- 4.2.2 Reduce Award Reason
  - 4.2.2.1 Overaward
  - 4.2.2.2 Enrollment Status Change
  - 4.2.2.3 EFC Change
  - 4.2.2.4 Other

---

*Note: If an award is reduced due to an Enrollment Status Change or an EFC Change, you will be required to change the Enrollment Status or EFC on the student's GEAR UP record prior to certification.*

---

- 4.2.3 Amount

4.3 If 'No' is selected, additional options display

- 4.3.1 No Award – selected
- 4.3.2 No Award Reason
  - 4.3.2.1 Not Enrolled
  - 4.3.2.2 EFC Change
  - 4.3.2.3 Unsatisfactory Progress
  - 4.3.2.4 Overaward
  - 4.3.2.5 Leave of Absence
  - 4.3.2.6 Verification Incomplete
  - 4.3.2.7 Other

---

*Note: If an award is not paid due to an Enrollment Status Change or an EFC Change, you will be required to change the Enrollment Status or EFC on the student's GEAR UP record prior to certification.*

---

- 4.3.3 Amount – prefilled with \$0

5. Click [Save].

All payment records for students certified to receive an award will be updated to “Ready to Pay” and will be available for payment by the Agency.

# 4 Submit Financial Aid Data

## 4.1 Submit Financial Aid Data

To submit financial aid data for students, follow these steps:

1. Select GEAR UP Scholarship then Submit Financial Aid Data and the Select Students screen is displayed.

Name	SSN	EFC	Dependency Status
GINA M. ROUSTAND	026-21-2121	1173	Dependent
YOHANNYS E. ANZIANI	087-11-1111	0	Independent
ANYERINES MARTINEZ	018-21-2121	1144	Independent
TAYLOR MASSIE	019-11-1111	99	Dependent
EVA REYNOS	072-21-2121	2673	Dependent

2. Select a student and the Submit Financial Data screen is displayed for the selected student.

**GEAR UP Scholarship  
Academic Year 2014-2015  
Submit Financial Data  
ANGIE COLON, XXX-XX-9866  
NORTHERN ESSEX COMMUNITY COLLEGE**

	Fall Enrollment	SELECT ONE	▼
	Spring Enrollment	SELECT ONE	▼

<b>Cost of Attendance</b>	<input type="text"/>	
<b>Estimated Family Contribution (EFC)</b>	<input type="text"/>	
MASSGrant	<input type="text"/>	Scholar-Internship Match Fund
Gilbert Grant	<input type="text"/>	Fee Waiver
Cash Grant	<input type="text"/>	PELL Grant
Part-Time Grant	<input type="text"/>	Federal SEOG
Foster Child Grant	<input type="text"/>	Federal Smart Grant
Paraprofessional Teacher Preparation Grant	<input type="text"/>	Academic Competitiveness Grant
Public Service Grant	<input type="text"/>	Federal Work Study
Christian Herter Memorial Scholarship	<input type="text"/>	No Interest Loan
Early Childhood Educators Scholarship	<input type="text"/>	Direct Subsidized Loan
John and Abigail Adams Scholarship	<input type="text"/>	Direct Unsubsidized Loan
Tuition Waiver	<input type="text"/>	PLUS
National Guard Tuition Waiver	<input type="text"/>	Federal Perkins Loan
National Guard Tuition/Fee Assistance	<input type="text"/>	Institutional Grants/Scholarships
Massachusetts Educational Rewards Grants	<input type="text"/>	Institutional Loan
Math & Science Teachers Scholarship	<input type="text"/>	TEACH Grant
High Demand Scholarship	<input type="text"/>	Iraq and Afghanistan Service Grant
Completion Incentive Grant	<input type="text"/>	Federal Family Education Loan Subsidized
Internship Incentive Program Grant	<input type="text"/>	Federal Family Education Loan Unsubsidized
Other Institutional Aid	<input type="text"/>	
Other Federal (Please Specify)	<input type="text"/>	<input type="text"/>
Other State (Please Specify)	<input type="text"/>	<input type="text"/>
Other Outside (Please Specify)	<input type="text"/>	<input type="text"/>
Other (Please Specify)	<input type="text"/>	<input type="text"/>

SAVE
CANCEL

3. Enter/edit one or more of the following (required fields are in **bold**):

- 3.1 **Fall Enrollment**
  - 3.1.1 Full-time
  - 3.1.2 ¾ time
  - 3.1.3 Half-time
  - 3.1.4 Less Than Half-time
  - 3.1.5 Not Enrolled

- 3.2 **Spring Enrollment**
  - 3.2.1 Full-time
  - 3.2.2 ¾ time
  - 3.2.3 Half-time
  - 3.2.4 Less Than Half-time
  - 3.2.5 Not Enrolled

- 3.3 **Cost of Attendance**

- 3.4 **Estimated Family Contribution (EFC)**

---

*Note: If a student's EFC value is updated, the user will be redirected to the EFC Change screen to enter the supporting EFC Change data.*

---

- 3.5 MASSGrant (this field is **required** if the EFC meets the Pell/MASSGrant EFC cutoff on the GEAR UP Award Rules)
- 3.6 Gilbert Grant
- 3.7 Cash Grant
- 3.8 Part-Time Grant
- 3.9 Foster Child Grant
- 3.10 Teacher Preparation Grant
- 3.11 Public Service Grant
- 3.12 Christian Herter Memorial Scholarship
- 3.13 Early Childhood Educators Scholarship
- 3.14 John and Abigail Adams Scholarship
- 3.15 Tuition Waiver
- 3.16 National Guard Tuition Waiver
- 3.17 National Guard Tuition/Fee Assistance
- 3.18 Massachusetts Educational Rewards Grant
- 3.19 Math & Science Teachers Scholarship
- 3.20 High Demand Scholarship
- 3.21 Completion Incentive Grant
- 3.22 Scholar-Internship Match Fund

- 3.23 GEAR UP Scholarship (display only field; not updateable)
  - 3.24 PELL Grant (this field is **required** if the EFC meets the Pell/MASSGrant EFC cutoff on the GEAR UP Award Rules)
  - 3.25 Federal SEOG
  - 3.26 Federal Smart Grant
  - 3.27 Academic Competitiveness Grant
  - 3.28 Federal Work Study
  - 3.29 No Interest Loan
  - 3.30 Direct Subsidized Loan
  - 3.31 Direct Unsubsidized Load
  - 3.32 PLUS
  - 3.33 Federal Perkins Loan
  - 3.34 Institutional Grants/Scholarships
  - 3.35 Institutional Loan
  - 3.36 TEACH Grant
  - 3.37 Iraq and Afghanistan Service Grant
  - 3.38 Federal Family Education Loan Subsidized
  - 3.39 Federal Family Education Loan Unsubsidized
  - 3.40 Other Institutional Aid
  - 3.41 Other Federal
  - 3.42 Other State
4. Click [Save].

Upon saving the student's financial aid data, the student's Need will be calculated and payment records will be created based on the need.



# Foster Child Grant

## 1 Award Rules

The Award Rules contain the annual award amounts, cutoff values, and cutoff dates necessary to administer each aid program.

### 1.1 View Foster Child Award Rules

To view the award rules, follow these steps:

1. Select Foster Child Grant then Award Rules and the Award Rules screen is displayed.

Award Rules Foster Child Grant	
Academic Year 2014 - 2015	
Change Academic Year: Year 2014 To 2015 ▾	
DCF Deadline Date	09/16/2014
Age Cutoff	24
Age As Of Date	09/01/2014
Pell/MASSGrant EFC Cutoff	5,157
Submit Financial Data Available Date	09/05/2014
Submit Financial Data Cutoff Date	02/10/2015
Fall Certification Available	09/09/2014
Spring Certification Available	01/12/2015
Program Email Address	blynch@osfa.mass.edu

[VIEW PAYMENT TABLE](#)

The award rules are displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

### 1.2 View Foster Child Payment Table

The Foster Child Grant payment table displays the annual award amount that will be awarded to students based on enrollment status.

To view/update the Foster Child Grant payment table, follow these steps:

1. From the Foster Child Grant Award Rules screen, click [View Payment Table].

2. The Foster Child Grant Payment Table screen is displayed.

Foster Child Grant Payment Table Academic Year 2014 - 2015			
Award Amounts			
All fields must be whole numbers			
	Fall	Spring	Total
Massachusetts Community College	1000	1000	2000
Massachusetts Nursing 2-year	3000	3000	6000
Massachusetts Nursing 3-year	3000	3000	6000
Massachusetts Proprietary 1-year	3000	3000	6000
Massachusetts Proprietary 2-year	3000	3000	6000
Massachusetts Private 2-year	3000	3000	6000
Massachusetts Private 2-year Special	2000	2000	4000
Massachusetts Private 4-year	3000	3000	6000
Massachusetts Private 5-year	0	0	0
Massachusetts State College	3000	3000	6000
Massachusetts State University	3000	3000	6000
Massachusetts Vocational Technical 1-year	3000	3000	6000
Massachusetts Vocational Technical 2-year	3000	3000	6000
Out of State Proprietary 1-year	0	0	0
Out of State Private 2-year	3000	3000	6000
Out of State Private 4-year	3000	3000	6000
Out of State Public 2-year	3000	3000	6000
Out of State Public 4-year	3000	3000	6000

**RETURN TO AWARD RULES**

*Note: This is a sample Payment Table for the Foster Child Grant program; actual award amounts may vary.*

The Foster Child Grant Payment Table is displayed for the academic year from which you viewed the Award Rules. To view an alternate academic year, return to the Award Rules screen and select the year in the Change Academic Year field at the top of the screen then select [View Payment Table].

## 2 School Profile

The School Profile contains school demographic and academic year information for all aid programs.

---

### 2.1 View Foster Child School Profile

To view the Foster Child Grant school profile, follow these steps:

1. Select Foster Child Grant then School Profile from the menu. The Foster Child Grant School Profile is displayed for the selected school.

The school profile is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

## View School Profile

BABSON COLLEGE, 002121- 00

Change Academic Year: Year 2014 to 2015

### Academic Year 2014 to 2015

School OECODE	002121
School Branch	00
Vendor ID	VC6000156859
Tax Identification Number (TIN)	
School Name	BABSON COLLEGE
Address	231 FOREST STREET
Address2	
City	BABSON PARK
State	Massachusetts
Zip Code	02457 - 0310
Phone Number	
Fax Number	
School Type	Massachusetts Private 4-year

### Program: Foster Child Grant

Contact Name	Mary Smith
Contact Title	Director of Financial Aid
Contact Email Address	email@email.com
Phone Number	222-222-2222
Fax Number	333-333-3333
Secondary Contact Name	
Secondary Contact Title	
Secondary Contact Email Address	
Secondary Phone Number	
Secondary Fax Number	
Active	Yes
Fall Certification Duration	120
Fall Reinstated Certification Duration	90
Spring Certification Duration	120
Spring Reinstated Certification Duration	90
Reconciliation Duration	30
Hold Payments	No

COMMENTS

UPDATE

TRANSACTION HISTORY

PAYMENT HISTORY

CANCEL

---

## 2.2 Update Foster Child School Profile

To update the Foster Child Grant school profile, you must have security level of “Update” or “Administrator” for Foster Child Grant. Follow these steps:

1. From the Foster Child Grant School Profile screen, click [Update].

---

*Note: School profiles can only be updated for the current and future academic years.*

---

2. The Update School Profile screen is displayed.
3. Edit one or more of the following fields (fields in **bold** are required):
  - 3.1 Contact Name
  - 3.2 Contact Title
  - 3.3 Contact Email Address
  - 3.4 Phone Number
  - 3.5 Fax Number
  - 3.6 Secondary Contact Name
  - 3.7 Secondary Contact Title
  - 3.8 Secondary Contact Email Address
  - 3.9 Secondary Phone Number
  - 3.10 Secondary Fax Number
4. Click [Save].

---

## 2.3 View Foster Child School Transaction History

The school transaction history displays updates made to the school profile chronologically by academic year. In addition, any comments entered online display in chronological order among the transactions.

To view a school’s Transaction History, follow these steps:

1. From the Foster Child Grant School Profile screen click [Transaction History]
2. The School Transaction History screen is displayed.

Updates to school demographics are not associated to an academic year; these updates display at the top of the transaction history.

---

## 2.4 View Foster Child School Payment History

To view the school’s payment history for an aid program, follow these steps:

1. From the Foster Child Grant School Profile screen click [Payment History]
2. The Payment History screen is displayed.

Payment History							
NORTHERN ESSEX COMMUNITY COLLEGE, 002174-00							
Current Balance: (\$1,000.00)				Change Academic Year 2014-2015			
Academic Year 2014-2015							
Date	Program	Term	Type	Batch Number	Reconciled	Number Of Students	Payment Amount
10/22/2014	Foster Child	Fall	Adjustment	B0120366-B0120544		1	(\$1,000.00)
09/30/2014	Foster Child	Fall	Payment	B0120366	Y	5	\$5,000.00
<b>Total:</b>							<b>\$4,000.00</b>

**CANCEL**

The school payment history is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen

*Note: The Current Balance represents any outstanding balance between the school and OSFA. If the Current Balance is positive, monies are owed to the school from OSFA. If the Current Balance is negative, monies are owed to OSFA from the school.*

### 2.4.1 View School Payment Batch Details

To view the details of a payment batch for a school, follow these steps:

1. From the School Payment History screen, select a Batch Number.
2. The School Payment Batch Details screen is displayed.

Payment Batch Detail					
NORTHERN ESSEX COMMUNITY COLLEGE, 002174-00					
Batch # B0120631					
10/31/2014					
Name	SSN	Payment Type	Term	Payment Amount	
1. LOPEZ, SIRENA	032-50-5050	Payment	Fall	\$450.00	
2. MEJIA, LUIS	102-88-8888	Payment	Fall	\$500.00	
3. RODRIGUEZ, RANGEL	550-50-5050	Payment	Fall	\$500.00	
4. ROSARIO, GENE	016-88-8888	Payment	Fall	\$400.00	
<b>Total:</b>					<b>\$1,850.00</b>

**CLOSE**

*Note: If there is a Current Balance for a school when the payment batch is created, the amount is netted with the payment amount. If this occurs, the 'Total Sent to School' will differ from the 'Total' of the payment batch.*

## 2.5 Add Comment on School Profile

School users can enter comments for display on the school's Transaction History.

To enter a comment for a school, follow these steps:

1. From the School Profile screen click [Comments].
2. The Add Comments screen is displayed.



**Add Comment**

**SAVE**

**CANCEL**

3. Enter comment text.
4. Click [Save].

# 3 Certification

School users must certify all student awards in order for the students to be paid.

---

## 3.1 Foster Child Grant Online Certification

Users can certify students through the online certification roster. Follow these steps:


1. Select Foster Child Grant then Certification from the menu.
2. The Select Academic Term screen is displayed.



Select Academic Term



Fall ▼



CERTIFICATION ROSTER

3. Select a term.

---

*Note: A term must be available for certification (per the Award Rules screen) in order to be selected. The screen will default to the most recent term available for certification.*

---

4. Click [Certification Roster] and the Online Certification Roster screen is displayed.



BAY PATH COLLEGE  
2014-2015 Spring Certification Roster  
Foster Child Grant

2 Students Remaining to Certify

Filter:

APPLY FILTER

REMOVE FILTER

Page

Certify	Name	SSN	# Days Remaining to Certify	Current Award Amount	Additional Options
<input type="radio"/> Pending <input checked="" type="radio"/> Yes <input type="radio"/> No	ABRIANA R. LOCKE	010-80-8080	38	\$3,000.00	<input type="checkbox"/> Reduce Award <input type="text"/> \$ <input type="text"/>
<input type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No	DAY'SHA RAMSEY	078-78-7878	38	\$3,000.00	

I certify that the students who are indicated as eligible for payment of a Foster Child Grant, have completed all verification and eligibility requirements, including citizenship and academic progress, as specified in the program guidelines.

SAVE

CANCEL

5. Enter/select the following:

5.1 Certification indicator

5.1.1 Pending (default) – student will remain on roster if selected

5.1.2 Yes

5.1.3 No

---

*Note: On the Fall Certification Roster, selecting 'No' will cancel the Fall and Spring award.*

---

5.2 If 'Yes' is selected, additional options display

5.2.1 Reduce Award (checkbox)

5.2.2 Reduce Award Reason

5.2.2.1 Overaward

5.2.2.2 Enrollment Status Change

5.2.2.3 EFC Change

5.2.2.4 Other

---

*Note: If an award is reduced due to an Enrollment Status Change or an EFC Change, you will be required to change the Enrollment Status or EFC on the student's Foster Child Grant record prior to certification.*

---

5.2.3 Amount

5.3 If 'No' is selected, additional options display

5.3.1 No Award – selected

5.3.2 No Award Reason

5.3.2.1 Not Enrolled

- 5.3.2.2 EFC Change
- 5.3.2.3 Unsatisfactory Progress
- 5.3.2.4 Overaward
- 5.3.2.5 Leave of Absence
- 5.3.2.6 Verification Incomplete
- 5.3.2.7 Other

---

*Note: If an award is not paid due to an Enrollment Status Change or an EFC Change, you will be required to change the Enrollment Status or EFC on the student's Foster Child Grant record prior to certification.*

---

5.3.3 Amount – prefilled with \$0

6. Click [Save].

All payment records for students certified as 'Yes' will be updated to "Ready to Pay" and will be available for payment by the Agency.

# 4 Submit Financial Aid Data

## 4.1 Submit Financial Aid Data

To submit financial aid data for students, follow these steps:

1. Select Foster Child Grant then Submit Financial Aid Data. The Select Students screen is displayed.

Name	SSN	EFC	Dependency Status
GINA M. ROUSTAND	026-21-2121	1173	Dependent
YOHANNYS E. ANZIANI	087-11-1111	0	Independent
ANYERINES MARTINEZ	018-21-2121	1144	Independent
TAYLOR MASSIE	019-11-1111	99	Dependent
EVA REYNOS	072-21-2121	2673	Dependent

2. Select a student and the Submit Financial Data screen is displayed for the selected student.

**Foster Child Grant**  
**Academic Year 2014-2015**  
**Submit Financial Data**  
**JILLIAN MENDES, XXX-XX-6810**  
**SALTER COLLEGE**

Please enter the appropriate costs for the enrollment statuses entered. If a student is 'Not Enrolled' for one term, please enter costs for the enrolled term only. If a student is enrolled for both terms, even if one term is less than full-time, please enter costs for both terms.

	<b>Fall Enrollment</b> SELECT ONE <input type="button" value="v"/>	
	<b>Spring Enrollment</b> SELECT ONE <input type="button" value="v"/>	
<b>Cost of Attendance</b>		
Tuition ONLY		Personal
Fees		Transportation
Room and Board		Child Care
Books and Supplies		
Other Costs (Please Specify)		
Other Costs (Please Specify)		
<b>Estimated Family Contribution (EFC)</b>		
MASSGrant		Scholar-Internship Match Fund
Gilbert Grant		Fee Waiver
Cash Grant		PELL Grant
Part-Time Grant		Federal SEOG
GEAR UP Scholarship		Federal Smart Grant
Paraprofessional Teacher Preparation Grant		Academic Competitiveness Grant
Public Service Grant		Federal Work Study
Christian Herter Memorial Scholarship		No Interest Loan
Early Childhood Educators Scholarship		Direct Subsidized Loan
John and Abigail Adams Scholarship		Direct Unsubsidized Loan
Tuition Waiver		PLUS
National Guard Tuition Waiver		Federal Perkins Loan
National Guard Tuition/Fee Assistance		Institutional Grants/Scholarships
Massachusetts Educational Rewards Grants		Institutional Loan
Math & Science Teachers Scholarship		TEACH Grant
High Demand Scholarship		Iraq and Afghanistan Service Grant
Completion Incentive Grant		Federal Family Education Loan Subsidized
Internship Incentive Program Grant		Federal Family Education Loan Unsubsidized
Other Institutional Aid		
Other Federal (Please Specify)		
Other State (Please Specify)		
Other Outside (Please Specify)		
Other (Please Specify)		

3. Enter/edit one or more of the following (required fields are in **bold**):

- 3.1 **Fall Enrollment**
  - 3.1.1 Full-time
  - 3.1.2 ¾ time
  - 3.1.3 Half-time
  - 3.1.4 Less Than Half-time
  - 3.1.5 Not Enrolled

- 3.2 **Spring Enrollment**
  - 3.2.1 Full-time
  - 3.2.2 ¾ time
  - 3.2.3 Half-time
  - 3.2.4 Less Than Half-time
  - 3.2.5 Not Enrolled

- 3.3 **Cost of Attendance**
  - 3.3.1 Tuition ONLY
  - 3.3.2 Fees
  - 3.3.3 Room and Board
  - 3.3.4 Books and Supplies
  - 3.3.5 Personal
  - 3.3.6 Transportation
  - 3.3.7 Child Care
  - 3.3.8 Other Costs (Please Specify)
  - 3.3.9 Other Costs (Please Specify)

- 3.4 **Estimated Family Contribution (EFC)**

---

*Note: If a student's EFC value is updated, the user will be redirected to the EFC Change screen to enter the supporting EFC Change data.*

---

- 3.5 MASSGrant (this field is **required** if the EFC meets the Pell/MASSGrant EFC cutoff on the Foster Child Grant Award Rules)
- 3.6 Gilbert Grant
- 3.7 Cash Grant
- 3.8 Part-Time Grant
- 3.9 Foster Child Grant
- 3.10 Teacher Preparation Grant
- 3.11 Public Service Grant
- 3.12 Christian Herter Memorial Scholarship
- 3.13 Early Childhood Educators Scholarship

- 3.14 John and Abigail Adams Scholarship
- 3.15 Tuition Waiver
- 3.16 National Guard Tuition Waiver
- 3.17 National Guard Tuition/Fee Assistance
- 3.18 Massachusetts Educational Rewards Grant
- 3.19 Math & Science Teachers Scholarship
- 3.20 High Demand Scholarship
- 3.21 Completion Incentive Grant
- 3.22 Scholar-Internship Match Fund
- 3.23 GEAR UP Scholarship (display only field; not updateable)
- 3.24 PELL Grant (this field is **required** if the EFC meets the Pell/MASSGrant EFC cutoff on the Foster Child Grant Award Rules)
- 3.25 Federal SEOG
- 3.26 Federal Smart Grant
- 3.27 Academic Competitiveness Grant
- 3.28 Federal Work Study
- 3.29 No Interest Loan
- 3.30 Direct Subsidized Loan
- 3.31 Direct Unsubsidized Load
- 3.32 PLUS
- 3.33 Federal Perkins Loan
- 3.34 Institutional Grants/Scholarships
- 3.35 Institutional Loan
- 3.36 TEACH Grant
- 3.37 Iraq and Afghanistan Service Grant
- 3.38 Federal Family Education Loan Subsidized
- 3.39 Federal Family Education Loan Unsubsidized
- 3.40 Other Institutional Aid
- 3.41 Other Federal
- 3.42 Other State

4. Click [Save].

Upon saving the student's financial aid data, the student's Need will be calculated and payment records will be created based on the need.

# DCF Fee Assistance

## 1 Award Rules

The Award Rules contain the annual award amounts, cutoff values, and cutoff dates necessary to administer each aid program.

### 1.1 View DCF Fee Assistance Award Rules

To view the award rules, follow these steps:

1. Select DCF Fee Assistance then Award Rules and the Award Rules screen is displayed.

The screenshot shows the 'Award Rules' screen for 'DCF Adopted and Foster Child Fee Assistance' for the 'Academic Year 2014 - 2015'. At the top, there is a header with the title and academic year. Below the header is a dropdown menu labeled 'Change Academic Year:' with 'Year 2014 To 2015' selected. The main content area is divided into two columns. The left column contains three rows of information: 'Age Cutoff' with the value '24', 'Age As Of Date' with the value '09/01/2014', and 'EFC Cutoff' with the value '999,999'. The right column contains four rows of information: 'Fall Create Records Available Date' with the value '08/01/2014', 'Fall Application Cutoff Date' with the value '12/30/2014', 'Spring Create Records Available Date' with the value '12/01/2014', and 'Spring Application Cutoff Date' with the value '05/01/2015'. At the bottom right of the right column, there is a row for 'Program Email Address' with the value 'omcardle@osfa.mass.edu'.

Award Rules	
DCF Adopted and Foster Child Fee Assistance	
Academic Year 2014 - 2015	
Change Academic Year: Year 2014 To 2015	
Age Cutoff	24
Age As Of Date	09/01/2014
EFC Cutoff	999,999
Fall Create Records Available Date	08/01/2014
Fall Application Cutoff Date	12/30/2014
Spring Create Records Available Date	12/01/2014
Spring Application Cutoff Date	05/01/2015
Program Email Address	omcardle@osfa.mass.edu

The award rules are displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

## 2 School Profile

The School Profile contains school demographic and academic year information for all aid programs.

---

### 2.1 View DCF Fee Assistance School Profile

To view the DCF Fee Assistance school profile, follow these steps:

1. Select DCF Fee Assistance then School Profile from the menu. The Select School screen is displayed.
2. Select a school, click [OK].
3. The DCF Fee Assistance School Profile is displayed for the selected school.

The school profile is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.



BERKSHIRE COMMUNITY COLLEGE, 002167- 00

Change Academic Year: Year 2014 to 2015

**Academic Year  
2014 to 2015**

School OECODE	002167
School Branch	00
Vendor ID	VTBCCFUND900
Tax Identification Number (TIN)	046002284
School Name	BERKSHIRE COMMUNITY COLLEGE
Address	1350 WEST STREET
Address2	
City	PITTSFIELD
State	Massachusetts
Zip Code	01201 - 5786
Phone Number	
Fax Number	
School Type	Massachusetts Community College

**Program: DCF Adopted and Foster Child Fee Assistance**

Contact Name	
Contact Title	
Contact Email Address	
Phone Number	
Fax Number	
Secondary Contact Name	
Secondary Contact Title	
Secondary Contact Email Address	
Secondary Phone Number	
Secondary Fax Number	
Active	Yes
Reconciliation Duration	30
Hold Payments	No

COMMENTS

UPDATE

TRANSACTION HISTORY

PAYMENT HISTORY

CANCEL

## 2.2 Update DCF Fee Assistance School Profile

To update the DCF Fee Assistance school profile, you must have security level of "Update" or "Administrator" for DCF Fee Assistance. Follow these steps:

1. From the DCF Fee Assistance School Profile screen, click [Update].

*Note: School profiles can only be updated for the current and future academic years.*

2. The Update School Profile screen is displayed.
3. Edit one or more of the following fields (fields in **bold** are required):
  - 3.1 Contact Name
  - 3.2 Contact Title
  - 3.3 Contact Email Address
  - 3.4 Phone Number
  - 3.5 Fax Number
  - 3.6 Secondary Contact Name
  - 3.7 Secondary Contact Title
  - 3.8 Secondary Contact Email Address
  - 3.9 Secondary Phone Number
  - 3.10 Secondary Fax Number
4. Click [Save].

---

## 2.3 View DCF Fee Assistance School Transaction History

The school transaction history displays updates made to the school profile chronologically by academic year. In addition, any comments entered online display in chronological order among the transactions.

To view a school's Transaction History, follow these steps:

1. From the DCF Fee Assistance School Profile screen click [Transaction History]
2. The School Transaction History screen is displayed.

Updates to school demographics are not associated to an academic year; these updates display at the top of the transaction history.

---

## 2.4 View DCF Fee Assistance School Payment History

To view the school's payment history for an aid program, follow these steps:

1. From the DCF Fee Assistance School Profile screen click [Payment History]
2. The Payment History screen is displayed.

**Payment History**  
**BERKSHIRE COMMUNITY COLLEGE, 002167-00**

Current Balance: \$0.00

Change Academic Year 2014-2015

**Academic Year 2014-2015**

Date	Program	Term	Type	Batch Number	Reconciled	Number Of Students	Payment Amount
01/07/2015	DCF Fee Assistance	Spring	Payment	<a href="#">B0120940</a>	N	10	\$4,529.00
01/06/2015	DCF Fee Assistance	Fall	Payment	<a href="#">B0120939</a>	N	11	\$12,859.00
12/29/2014	DCF Fee Assistance	Fall	Payment	<a href="#">B0120927</a>	Y	1	\$500.00
12/26/2014	DCF Fee Assistance	Fall	Payment	<a href="#">B0120925</a>	Y	2	\$6,000.00
<b>Total:</b>							<b>\$23,888.00</b>

**CANCEL**

The school payment history is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen

*Note: The Current Balance represents any outstanding balance between the school and OSFA. If the Current Balance is positive, monies are owed to the school from OSFA. If the Current Balance is negative, monies are owed to OSFA from the school.*

### 2.4.1 View School Payment Batch Details

To view the details of a payment batch for a school, follow these steps:

1. From the School Payment History screen, select a Batch Number.
2. The School Payment Batch Details screen is displayed.

**Payment Batch Detail**  
**NORTHERN ESSEX COMMUNITY COLLEGE, 002174-00**  
**Batch # B0120631**  
**10/31/2014**

Name	SSN	Payment Type	Term	Payment Amount
1. LOPEZ, SIRENA	032-50-5050	Payment	Fall	\$450.00
2. MEJIA, LUIS	102-88-8888	Payment	Fall	\$500.00
3. RODRIGUEZ, RANGEL	550-50-5050	Payment	Fall	\$500.00
4. ROSARIO, GENE	016-88-8888	Payment	Fall	\$400.00
<b>Total:</b>				<b>\$1,850.00</b>

**CLOSE**

*Note: If there is a Current Balance for a school when the payment batch is created, the amount is netted with the payment amount. If this occurs, the 'Total Sent to School' will differ from the 'Total' of the payment batch.*

---

## 2.5 Add Comment on School Profile

School users can enter comments for display on the school's Transaction History.

To enter a comment for a school, follow these steps:

1. From the School Profile screen click [Comments].
2. The Add Comments screen is displayed.



3. Enter comment text.
4. Click [Save].

# 3 Create DCF Fee Assistance Records

## 3.1 Create Records for a Term – MA Residents

To submit financial aid data for students, follow these steps:

1. Select DCF Fee Assistance then Create DCF Fee Assistance Records and the Select Term screen is displayed.
2. Select a term and click [OK].
3. The Search Students screen is displayed for the selected term.



Create DCF Adopted and Foster Child Fee Assistance Records  
002122-00, BAY PATH COLLEGE  
Search Students Fall 2014-2015

Last Name   
First Name   
SSN

SEARCH ADD NON-RESIDENT UPLOAD FILE RESET

Enter as much information as possible for faster response time.

**Search Results**  
No matches found.

Results shown below represent DCF Fee Assistance students with no financial data for the term selected.

---

*Note: Students will pre-fill if DCF Fee Assistance data has been entered for the student for a different term but do not have any data for the selected term.*

---

4. Enter one or more search criteria:
  - 4.1 Full or partial last name
  - 4.2 Full or partial first name
  - 4.3 SSN
5. Click [Search]; students matching your search results are displayed.

3 matches found.

Page 1 of 1

Name	SSN	EFC	DependencyStatus
TAHIRAH M GRAHAM	<u>013-13-1313</u>	3977	Independent
KATIE A GRAHAM	<u>026-88-8888</u>	0	Independent
JACLYN GRAHAM	<u>031-13-1313</u>	8660	Independent

CLOSE

6. Select a student and the Submit Financial Information screen is displayed for the selected student.

**DCF Adopted and Foster Child Fee Assistance**  
Fall 2014-2015

**Submit Financial Information**  
**KATIE A GRAHAM, XXX-XX-8840**

Fee Assistance Type

Estimated Family Contribution (EFC) 0

Family Size 5

Parent Adjusted Gross Income

---

Fall Enrollment  FullTime

Number of State Supported Fall Credits

Number of Non-State Supported Fall Credits

Total Fall Fees Waived (State Supported Only)

**SAVE** **CANCEL**

7. Enter/edit one or more of the following (required fields are in **bold**):

7.1 **Fee Assistance Type**

7.1.1 Adopted

7.1.2 Foster Child

7.2 **Number of State Supported Term Credits**

7.3 **Number of Non-State Supported Term Credits**

7.4 **Total Term Fees Waived (State Supported Only)**

8. Click [Save].

Upon saving the student's financial aid data, student eligibility will be determined and, if eligible, a payment record will be created for the term.

---

## 3.2 Create Records for a Term – Non-MA Residents

To submit financial aid data for non-resident students, follow these steps:

1. Select DCF Fee Assistance then Create DCF Fee Assistance Records and the Select Term screen is displayed.
2. Select a term and click [OK].
3. The Search Students screen is displayed for the selected term.



Create DCF Adopted and Foster Child Fee Assistance Records  
002122-00, BAY PATH COLLEGE  
Search Students Fall 2014-2015

Last Name   
First Name   
SSN

SEARCH ADD NON-RESIDENT UPLOAD FILE RESET

ⓘ Enter as much information as possible for faster response time.  
**Search Results**  
No matches found.  
Results shown below represent DCF Fee Assistance students with no financial data for the term selected.

---

*Note: Students will pre-fill if DCF Fee Assistance data has been entered for the student for a different term but do not have any data for the selected term.*

---

4. Click [Add Non-Resident]; the Submit Financial Information for Non-Resident screen is displayed.

DCF Adopted and Foster Child Fee Assistance  
Academic Year 2014 - 2015

**Student Information**

SSN	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Middle	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text" value=""/>
Zip Code	<input type="text"/>
Home Phone	<input type="text"/>
Email Address	<input type="text"/>
Gender	<input type="text" value=""/>

**Application Information**

Institution	002122-00, BAY PATH COLLEGE <input type="text" value=""/>
Dependency Status	<input type="text" value=""/>
Title IV Eligible	<input type="text" value=""/>
Grade Level	<input type="text" value=""/>
Degree/Certificate Pursuing	<input type="text" value=""/>
Bachelors Degree Already Received	<input type="text" value=""/>
Master/Doctorate Already Received	<input type="text" value=""/>

**Financial Information**

Fee Assistance Type	<input type="text" value=""/>
Estimated Family Contribution(EFC)	<input type="text"/>
Family Size	<input type="text"/>
Parent Adjust Gross Income	<input type="text"/>
Fall DATA:	
Fall Enrollment	<input type="text" value=""/>
Number of State Supported Fall Credits	<input type="text"/>
Number of Non-State Supported Fall Credits	<input type="text"/>
Total Fall Fees Waived (State Supported Only)	<input type="text"/>

To complete eligibility determination, please submit a hard copy of the student's FAFSA to the Office of Student Financial Assistance.

SAVE

CANCEL

5. Enter/select the following (required fields are in bold):

5.1 **SSN**



- 5.2 **Last Name**
- 5.3 **First Name**
- 5.4 Middle Initial
- 5.5 **Date of Birth**
- 5.6 **Address**
- 5.7 **City**
- 5.8 **State**
- 5.9 **Zip Code**
- 5.10 **Home Phone**
- 5.11 Email Address
- 5.12 **Gender**
- 5.13 **Institution**
- 5.14 **Dependency Status**
- 5.15 **Title IV Eligible**
- 5.16 **Grade Level**
- 5.17 **Degree/Certificate Pursuing**
- 5.18 **Bachelors Degree Already Received**
- 5.19 **Masters/Doctorate Already Received**
- 5.20 **Fee Assistance Type**
- 5.21 **EFC**
- 5.22 **Family Size**
- 5.23 **Parent AGI**
- 5.24 ***Term* Enrollment**
- 5.25 **Number of State Supported *Term* Credits**
- 5.26 **Number of Non-State Supported *Term* Credits**
- 5.27 **Total *Term* Fees Waived (State Supported Only)**

6. Click [Save].

Upon saving the student's financial aid data, student eligibility will be determined and, if eligible, a payment record will be created for the term.

---

### 3.3 Upload Records


To upload a file of financial aid data for students, follow these steps:

1. Select DCF Fee Assistance then Create DCF Fee Assistance Records and the Select Term screen is displayed.
2. Select a term and click [OK].
3. The Search Students screen is displayed for the selected term.

**Create DCF Adopted and Foster Child Fee Assistance Records**  
002122-00, BAY PATH COLLEGE  
**Search Students Fall 2014-2015**

Last Name   
First Name   
SSN

**SEARCH**      **ADD NON-RESIDENT**      **UPLOAD FILE**      **RESET**

 Enter as much information as possible for faster response time.

**Search Results**

No matches found.

Results shown below represent DCF Fee Assistance students with no financial data for the term selected.

---

*Note: Students will pre-fill if DCF Fee Assistance data has been entered for the student for a different term but do not have any data for the selected term.*

---

4. Click [Upload] and the Verify Criteria screen is displayed.

**Verify Criteria**

Select ACYear: 2014-2015

Select Program: DCF Adopted and Foster Child Fee Assistance

You are about to upload a file of DCF Adopted and Foster Child Fee Assistance Students in a Comma Separated Value (CSV) file format([click here](#) to view the file layout specifications).

**UPLOAD FILE**

5. Click [Upload File].  
6. The Upload DCF Fee Assistance Students screen is displayed.


**Upload DCF Adopted and Foster Child Fee Assistance Students**




File:

**UPLOAD**

7. Click [Browse] and browse to the certification file to be uploaded, click [Open].  
8. The file name will populate, click [Upload].  
9. The File Request screen is displayed. Refresh the screen until the file has completed processing; indicated by a Down Arrow icon in the Download column.

## File Requests

Select Institution:  

File Type	Request Date	Status	User Name	Aid Program	Term	Download
Upload Student DCF Fee Assistance File 2014-2015	01-30-2015	The File has completed successfully.	olliemcla	DCF Adopted and Foster Child Fee Assistance	Spring	
Upload Student DCF Fee Assistance File 2014-2015	01-30-2015	The File has completed successfully.	olliemcla	DCF Adopted and Foster Child Fee Assistance	Fall	
Upload Student DCF Fee Assistance File 2014-2015	01-30-2015	The File has been processed but errors were found.	rgrahamMASS500	DCF Adopted and Foster Child Fee Assistance	Fall	

*Note: Users may navigate away while waiting for the file to process. Simply select File Requests from the main menu to return to this screen and view the file status.*

*Once the file has completed, the status column will indicate the file has completed successfully or indicate there were errors. You may select the status column for additional details.*

- Once the file has completed processing, select the 'Status' column, the File Processing Information screen will display.

### File Processing Information

**File Date: 1/30/2015**

**File Name: DCF Foster Fee Record Upload\_2015013012455213.txt**

### Processing Messages

Number of Records Parsed from File = 8

Number of Records Uploaded = 8

**FILE REQUESTS**

*Sample if all records processed*

# Shared Functions Across Aid Programs

## 1 Payment History

The Payment History contains all payments and refunds by batch for each aid program by academic year.

### 1.1 View Payment History

To view the payment history for an aid program, follow these steps:

1. Select an aid program then Payment History from the menu. The Payment History screen is displayed for the selected aid program.

Payment History							
AMERICAN INTERNATIONAL COLLEGE, 002114-00							
Current Balance: \$0.00				Change Academic Year 2014-2015			
Academic Year 2014-2015							
Date	Program	Term	Type	Batch Number	Reconciled	Number Of Students	Payment Amount
11/18/2014	MASSGrant	Fall	Payment	<a href="#">B0120808</a>	N	1	\$850.00
11/14/2014	MASSGrant	Fall	Payment	<a href="#">B0120774</a>	N	1	\$298.00
11/06/2014	MASSGrant	Fall	Adjustment	<a href="#">B0120445-B0120698</a>		1	(\$200.00)
11/06/2014	MASSGrant	Fall	Adjustment	<a href="#">B0120445-B0120699</a>		1	(\$298.00)
11/05/2014	MASSGrant	Fall	Adjustment	<a href="#">B0120445-B0120681</a>		1	(\$850.00)
11/03/2014	MASSGrant	Fall	Adjustment	<a href="#">B0120445-B0120646</a>		1	(\$50.00)
10/20/2014	MASSGrant	Fall	Adjustment	<a href="#">B0120445-B0120517</a>		5	(\$2,398.00)
10/09/2014	MASSGrant	Fall	Payment	<a href="#">B0120445</a>	Y	376	\$243,550.00
Total:							\$240,902.00

CANCEL

The payment history is displayed for the current academic year by default. To view an alternate academic year, select the year in the Change Academic Year field at the top of the screen.

#### 1.1.1 View Payment Batch Detail

To view the details of a payment batch, follow these steps:

1. From the Payment History screen, select the batch number.
2. The Payment Batch Details screen is displayed.

Payment Batch Detail				
AMERICAN INTERNATIONAL COLLEGE, 002114-00				
Batch # B0106627				
11/07/2013				
Name	SSN	Payment Type	Term	Payment Amount
1. BERBERENA, JOSELYN	599-99-9999	Payment	Fall	\$800.00
2. MBENGAM, ANNA	199-99-9999	Payment	Fall	\$800.00
3. PIERRE, ASHLEY	299-99-9999	Payment	Fall	\$150.00
4. ROMANENKO, OLGA	399-99-9999	Payment	Fall	\$800.00
<b>Total:</b>				<b>\$2,550.00</b>
<b>Total Sent To School:</b>				<b>\$2,550.00</b>

The 'Total Sent to School' may differ from the 'Total' due to an outstanding balance for the school at the time the batch was paid.

**CLOSE**

---

*Note: If there is a Current Balance for a school when the payment batch is created, the amount is netted with the payment amount. If this occurs, the 'Total Sent to School' will differ from the 'Total' of the payment batch for each school.*

---

## 2 Request Reinstatement

School users must request reinstatement onto a certification roster for any students who were not certified within the allotted duration or were previously certified as ineligible to receive funds. The Agency must approve the reinstatement prior to any students being placed back on a certification roster.

---

*Note: The feature does not apply to the NIL program.*

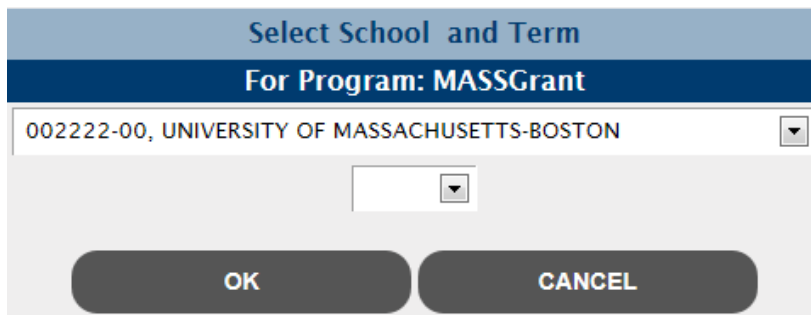
---

### 2.1 Request Reinstatement of Student Award

Users can request the reinstatement of a student's award through the request reinstatement feature.

To request reinstatement for one or more students, follow these steps:

1. Select an aid program then Request Reinstatement from the menu. The Select School and Term screen is displayed for the selected aid program for the user's school.



The screenshot shows a dialog box titled "Select School and Term" for the "MASSGrant" program. It features a dropdown menu with "002222-00, UNIVERSITY OF MASSACHUSETTS-BOSTON" selected. Below the dropdown is another empty dropdown menu. At the bottom are "OK" and "CANCEL" buttons.

2. Select a term and click [OK].
3. The Request Reinstatement screen is displayed listing all students whose days to certify expired or were previously certified as ineligible to receive funds.

UNIVERSITY OF MASSACHUSETTS-BOSTON  
Request Reinstatement - Fall 2014-2015  
MASSGrant

Total Students: 1553

APPLY FILTER

REMOVE FILTER

Name	SSN	Reason Not Awarded	Award Amount	Request Reinstatement
EDIE R. AARON	XXX-XX-2222	Other	750	<input type="checkbox"/>
STEVEN R. ABRAHAM	XXX-XX-3333	Days to Certify Expired	200	<input type="checkbox"/>
ARNAR ABREU	XXX-XX-2222	Less than Full-time	750	<input type="checkbox"/>
MARAN ABREU	XXX-XX-3333	Days to Certify Expired	750	<input type="checkbox"/>
SEYED ABTAHI	XXX-XX-2222	Days to Certify Expired	200	<input type="checkbox"/>
FRANCES ACHUO	XXX-XX-3333	Less than Full-time	750	<input type="checkbox"/>
CARLINNE ADAMES	XXX-XX-2222	Not Enrolled	750	<input type="checkbox"/>

<<

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>>

By selecting Save, I am requesting reinstatement for the students selected. If approved these students will be placed back on the certification roster.

SAVE

CANCEL

- Select one or more students for reinstatement and click [Save].

*Note: Students may be filtered by last name. In addition, if multiple page of students are displayed, select students for reinstatement on any page and then click [Save]; all students selected, regardless of page, will have reinstatement requested.*

All students selected for reinstatement must first be approved by OSFA prior to displaying on the school certification roster.

# 3 Reconcile Payments

School users must reconcile all student awards after they are paid to validate the amount paid. Through online reconciliation or the download/upload reconcile file feature, school users have multiple ways to easily reconcile payments.

---

*Note: The feature does not apply to the NIL program.*

---

## 3.1 Online Reconciliation

Users can reconcile payments through the online reconcile payments roster.

To begin the online reconciliation process, follow these steps:

1. Select an aid program then Reconcile Payments from the menu. The Select Payment Batch to Reconcile screen is displayed listing all payment batches disbursed for the current academic year that have not been reconciled.

Select Payment Batch to Reconcile						
BAY PATH COLLEGE						
MASSGrant 2014-2015						
			Page			
Batch Number	Batch Date	Term	Batch Total	Batch Count		
B0120553	10-23-2014	Fall	\$194,500.00	309	<a href="#">Reconcile</a>	<a href="#">Download</a> <a href="#">Upload</a>
B0120774	11-14-2014	Fall	\$7,000.00	9	<a href="#">Reconcile</a>	<a href="#">Download</a> <a href="#">Upload</a>

---

*Note: The 'Download' and 'Upload' links are only available for the MASSGrant program.*

---

2. Select the 'Reconcile' link for a batch. The Reconcile Payments screen is displayed.



**BAY PATH COLLEGE  
Reconcile Payments  
MASSGrant  
Batch #: B0120774**

Name	SSN	Term	Payment Amount	Reconciliation
1. TINA BURST	XXX-XX-2020	Fall	\$850.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)
2. MELISSA DUHANEY	XXX-XX-8585	Fall	\$850.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)
3. DENISE HALL	XXX-XX-5050	Fall	\$850.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)
4. ALLISON KULAS	XXX-XX-1212	Fall	\$850.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)
5. AIDA NUNEZ	XXX-XX-6464	Fall	\$850.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)
6. LESLIE ORTIZ	XXX-XX-3131	Fall	\$850.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)

Page 1 of 2

3. To reconcile a batch of payments:
  - 3.1 For each student listed, select a reconciliation value:
    - 3.1.1 Paid Full Amount
    - 3.1.2 Paid Partial Amount
      - 3.1.2.1 Amount Paid

---

*Note: The amount paid is required if 'Paid Partial Amount' is selected.*

---

- 3.1.3 Not Paid (Full Refund)
- 3.2 Click [Save].

---

*Note: If multiple pages of students are displayed, select a reconciliation value for students on any page and then click [Save]; all students with a selection, regardless of page, will be reconciled.*

---

---

*Users do not have to reconcile the entire batch at once; the data will be saved and users can return and reconcile the remaining students at a later time.*

---

When the entire batch has been reconciled, refunds will be posted for any students not paid in full.

## 3.2 Download MASSGrant Reconcile Payments File

Users can download a MASSGrant Reconcile Payments file for processing in their school based software.

*Note: This feature is only available for the MASSGrant program.*

*The download option is available to all schools, but each school must be set up to process the file through their school based software for this feature to be useful.*

---

To download the reconcile payments file, follow these steps:

1. Select MASSGrant then Reconcile Payments from the menu. The Select Payment Batch to Reconcile screen is displayed listing all payment batches disbursed for the current academic year that have not been reconciled.

Batch Number	Batch Date	Term	Batch Total	Batch Count	Reconcile	Download	Upload
B0120553	10-23-2014	Fall	\$194,500.00	309	<a href="#">Reconcile</a>	<a href="#">Download</a>	<a href="#">Upload</a>
B0120774	11-14-2014	Fall	\$7,000.00	9	<a href="#">Reconcile</a>	<a href="#">Download</a>	<a href="#">Upload</a>

2. Select the 'Download' link for a batch.
3. The Verity Criteria screen displays. Verify the batch selected, click [Download File].

**Verify Criteria**  
Program: MASSGrant  
Institution: BAY PATH COLLEGE  
Batch Number: B0120553

You are about to download the Reconcile Payments File in a Comma Separated Value (CSV) file format that can be loaded into your school based software for processing ([click here](#) to view the file layout specifications).

If you do not want to download a reconcile payments file, you can reconcile online via the Reconcile Payments menu option.

**DOWNLOAD FILE**


- The File Request screen is displayed. Refresh the screen until the file has completed processing; indicated by a Down Arrow icon in the Download column.

File Requests						
Select Institution: 002130-00, BOSTON UNIVERSITY						
File Type	Request Date	Status	User Name	Aid Program	Term	Download
Download Reconcile Payments File for Batch B0099065	03-06-2012	File request has been received and is awaiting processing.	rgrahamMASS500	MASSGrant	Spring	

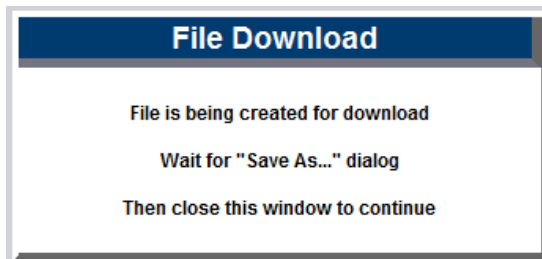
*Note: Users may navigate away while waiting for the file to process. Simply select File Requests from the main menu to return to this screen and view the file status.*

*Once the file has completed, the status column will indicate the file has completed successfully or indicate there were errors. You may select the status column for additional details.*

- Select the Down Arrow icon.

File Requests						
Select Institution: 002130-00, BOSTON UNIVERSITY						
File Type	Request Date	Status	User Name	Aid Program	Term	Download
Download Reconcile Payments File for Batch B0099065	03-06-2012	File request has been received and is awaiting processing.	rgrahamMASS500	MASSGrant	Spring	

- A File Download message displays and then the standard Open/Save/Save As dialog box displays.



- Select [Open] to view the file.
- Select [Save] or [Save As] to save the file.

**Go to MASSAid/Help to see the Reconcile Payments File Layouts**

### 3.3 Upload MASSGrant Reconcile Payments File

Users can upload a MASSGrant Reconcile Payments file populated from their school based software to reconcile payments within a batch.

*Note: This feature is only available for the MASSGrant program.*

*The upload option is available to all schools, but each school must be set up to process files through their school based software for this feature to be useful.*

To upload the reconcile payments file, follow these steps:

1. Select MASSGrant then Reconcile Payments from the menu. The Select Payment Batch to Reconcile screen is displayed listing all payment batches disbursed for the current academic year that have not been reconciled.

Batch Number	Batch Date	Term	Batch Total	Batch Count	Reconcile	Download	Upload
B0120553	10-23-2014	Fall	\$194,500.00	309	<a href="#">Reconcile</a>	<a href="#">Download</a>	<a href="#">Upload</a>
B0120774	11-14-2014	Fall	\$7,000.00	9	<a href="#">Reconcile</a>	<a href="#">Download</a>	<a href="#">Upload</a>

2. Select the 'Upload' link for a batch.
3. The Verify Criteria screen displays. Verify the batch selected, click [Upload File].

**Verify Criteria**

Program: MASSGrant  
Institution: BAY PATH COLLEGE  
Batch Number: B0120553

You are about to upload the Reconcile Payments File in a Comma Separated Value (CSV) file format that can be used to electronically reconcile student payments. ([click here](#) to view the file layout specifications).

If you do not want to upload a reconcile payments file, you can reconcile online via the Reconcile Payments menu option.

**UPLOAD FILE**

4. The Upload Reconcile Payments File screen is displayed.



**Upload Reconcile Payments File**

File:

**UPLOAD**

5. Click [Browse] and browse to the file to be uploaded, click [Open].
6. The file name will populate, click [Upload].

7. The File Request screen is displayed. Refresh the screen until the file has completed processing; indicated by a Down Arrow icon in the Download column.

File Requests						
Select Institution: 002130-00, BOSTON UNIVERSITY						
File Type	Request Date	Status	User Name	Aid Program	Term	Download
Download Reconcile Payments File for Batch B0073783	03-01-2012	The File has completed successfully.	rgrahamMASS500	MASSGrant	Spring	
Upload Reconcile Payments File for Batch B0073783	03-02-2012	The File has completed successfully.	rgrahamMASS500	MASSGrant	Spring	

*Note: Users may navigate away while waiting for the file to process. Simply select File Requests from the main menu to return to this screen and view the file status.*

*Once the file has completed, the status column will indicate the file has completed successfully or indicate there were errors. You may select the status column for additional details.*

8. Once the file has completed processing, select the 'Status' column, the File Processing Information screen will display.

File Processing Information	
File Date: 3/2/2012	
File Name: MASSGrantReconciliationUpload_2012030214335413.txt	
Processing Messages	
Number of Records Parsed from File = 14	
Number of Records Reconciled for batch B0073783 = 14	
<a href="#">File Requests</a>	

*Sample if all records processed*

File Processing Information	
File Date: 5/9/2012	
File Name: MASSGrantReconciliationUpload_2012050908395802.txt	
Processing Messages	
Number of Records Parsed from File = 17	
666-66-6666 - 6666666666 is in the original payment batch and not in the file	
610-55-6891 - Unable to check student data	
Unable to Reconcile Batch B0099727	
<a href="#">File Requests</a>	

*Sample if there were errors found*

9. Users may upload another reconcile payments file to fix any errors reported; **if ANY record rejects in the file the entire file is rejected.** The entire batch must be processed as a whole.

**Go to MASSAid/Help to see the Reconcile Payments File Layouts**

# 4 Reconcile at Year-End

School users must reconcile all student awards at year-end to validate the amount paid. Through online year-end reconciliation or the download/upload year-end reconciliation file feature, school users have multiple ways to easily reconcile year-end.

---

*Note: The feature does not apply to the NIL program.*

---

## 4.1 Online Year-End Reconciliation

Users can reconcile year-end through the online year-end reconciliation roster.

To begin the online year-end reconciliation process, follow these steps:

1. Select an aid program then Reconcile Year-End YY/YY from the menu. The Year-End Reconciliation screen is displayed.

**Year-End Reconciliation**  
**UNIVERSITY OF MASSACHUSETTS-BOSTON**  
**MASSGrant 2013-2014**

Select one of the following to perform year-end reconciliation:

- [Online](#) Year-End Reconciliation Roster
- [Download](#) Year-End Reconciliation File
- [Upload](#) Year-End Reconciliation File

---

*Note: The 'Download' and 'Upload' option only display for the MASSGrant program.*

---

2. Select the 'Online' link. The Reconcile Year-End Payments screen is displayed.

**CARNEGIE MELLON UNIVERSITY**  
**Reconcile Year-End Payments**  
**MASSGrant 2013-2014**

Name	SSN	Term	Payment Amount	Reconciliation
1. HOWARD ALPE	xxx-xx-9090	Fall	\$150.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)
2. HOWARD ALPERT	xxx-xx-9090	Spring	\$150.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)
3. XI CHEN	xxx-xx-0000	Fall	\$150.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)
4. XI CHEN	xxx-xx-0000	Spring	\$150.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)

Page 1 of 4   
 Show Un-Reconciled Records

3. To reconcile year-end payments:
  - 3.1 For each payment listed, select a reconciliation value:
    - 3.1.1 Paid Full Amount
    - 3.1.2 Paid Partial Amount
      - 3.1.2.1 Amount Paid
    - 3.1.3 Not Paid (Full Refund)
  - 3.2 Click [Save].

---

*Note: The amount paid is required if 'Paid Partial Amount' is selected.*

---

*Note: Payments for students who have been previously fully refunded for a term will not display.*

*If multiple pages of students are displayed, select a reconciliation value for students on any page and then click [Save]; all students with a selection, regardless of page, will be reconciled.*

*Users do not have to reconcile the entire year-end at once; the data will be saved and users can return and reconcile the remaining students at a later time.*

---

When the entire year-end has been reconciled, refunds will be posted for any students not paid in full.



## 4.2 Download MASSGrant Year-End Reconciliation File

Users can download a MASSGrant Year-End Reconciliation file for processing in their school based software.

*Note: This is only available for the MASSGrant program.*

*The download option is available to all schools, but each school must be set up to process the file through their school based software for this feature to be useful.*

To download the year-end reconciliation file, follow these steps:

1. Select MASSGrant then Reconcile Year-End YY/YY from the menu. The Year-End Reconciliation screen is displayed.

**Year-End Reconciliation**  
**UNIVERSITY OF MASSACHUSETTS-BOSTON**  
**MASSGrant 2013-2014**

Select one of the following to perform year-end reconciliation:

[Online](#) Year-End Reconciliation Roster

[Download](#) Year-End Reconciliation File

[Upload](#) Year-End Reconciliation File

2. Select the 'Download' link.
3. The Verity Criteria screen displays. Verify the information, click [Download File].

**Verify Criteria**


Program: MASSGrant  
Institution: CARNEGIE MELLON UNIVERSITY  
Year-End: 2013-2014

You are about to download the Year-End Reconciliation File in a Comma Separated Value (CSV) file format that can be loaded into your school based software for processing ([click here](#) to view the file layout specifications).

If you do not want to download a year-end reconciliation file, you can reconcile the year-end online via the Reconcile Year-End menu option.

**DOWNLOAD FILE**

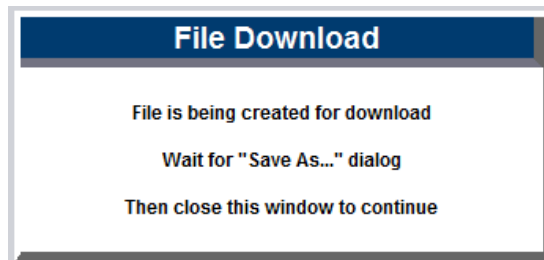
4. The File Request screen is displayed. Refresh the screen until the file has completed processing; indicated by a Down Arrow icon in the Download column.

File Requests						
Select Institution: 002130-00, BOSTON UNIVERSITY						
File Type	Request Date	Status	User Name	Aid Program	Term	Download
Download MASSGrant Certification Roster	03-02-2012	The File has completed successfully.	bhunter	MASSGrant	Fall	
Download Year-End Reconciliation File for 2011-2012	06-18-2012	File request has been received and is awaiting processing.	rGrahamMASS500	MASSGrant		

*Note: Users may navigate away while waiting for the file to process. Simply select File Requests from the main menu to return to this screen and view the file status.*

*Once the file has completed, the status column will indicate the file has completed successfully or indicate there were errors. You may select the status column for additional details.*

5. Select the Down Arrow icon.
6. A File Download message displays and then the standard Open/Save/Save As dialog box displays.



7. Select [Open] to view the file.
8. Select [Save] or [Save As] to save the file.

**Go to MASSAid/Help to see the Reconcile Year-End File Layouts**

## 4.3 Upload MASSGrant Year-End Reconciliation File

Users can upload a MASSGrant Year-End Reconciliation file populated from their school based software to reconcile year-end.

*Note: This feature is only available for the MASSGrant program.*

*The upload option is available to all schools, but each school must be set up to process files through their school based software for this feature to be useful.*

To upload the year-end reconciliation file, follow these steps:

1. Select MASSGrant Reconcile Year-End YY/YY from the menu. The Year-End Reconciliation screen is displayed.

## Year-End Reconciliation

### UNIVERSITY OF MASSACHUSETTS-BOSTON MASSGrant 2013-2014

Select one of the following to perform year-end reconciliation:

[Online](#) Year-End Reconciliation Roster

[Download](#) Year-End Reconciliation File

[Upload](#) Year-End Reconciliation File

2. Select the 'Upload' link.
3. The Verity Criteria screen displays. Verify the information, click [Upload File].

#### Verify Criteria

Program: MASSGrant

Institution: CARNEGIE MELLON UNIVERSITY

Year-End: 2013-2014

You are about to upload the Year-End Reconciliation File in a Comma Separated Value (CSV) file format that can be used to electronically reconcile student payments. ([click here](#) to view the file layout specifications).

If you do not want to upload a year-end reconciliation file, you can reconcile the year-end online via the Reconcile Year-End menu option.

UPLOAD FILE


4. The Upload Year-End Reconciliation File screen is displayed.

#### Upload Year-End Reconciliation File

File:

UPLOAD

5. Click [Browse] and browse to the file to be uploaded, click [Open].
6. The file name will populate, click [Upload].
7. The File Request screen is displayed. Refresh the screen until the file has completed processing; indicated by a Down Arrow icon in the Download column.

File Requests						
Select Institution: 002130-00, BOSTON UNIVERSITY						
File Type	Request Date	Status	User Name	Aid Program	Term	Download
Download Year-End Reconciliation File for 2011-2012	06-14-2012	The File has completed successfully.	delligariMASS500	MASSGrant		
Upload Year-End Reconciliation File for 2011-2012	06-14-2012	The File is being executed.	delligariMASS500	MASSGrant		

*Note: Users may navigate away while waiting for the file to process. Simply select File Requests from the main menu to return to this screen and view the file status.*

*Once the file has completed, the status column will indicate the file has completed successfully or indicate there were errors. You may select the status column for additional details.*

- Once the file has completed processing, select the 'Status' column, the File Processing Information screen will display.

File Processing Information	
File Date: 6/19/2012	
File Name: MASSGrantYearEndReconcileUpload_2012061909284944.txt	
Processing Messages	
Number of Records Parsed from File = 12	
Number of Records Reconciled for Year-End:2011-2012 = 12	
<a href="#">File Requests</a>	

*Sample if all records processed*

File Processing Information	
File Date: 6/19/2012	
File Name: MASSGrantYearEndReconcileUpload_2012061909284944.txt	
Processing Messages	
Number of Records Parsed from File = 1	
010-00-0000 - 0100000000 is on the Year-End roster for the Fall term and not in the file	
020-00-0000 - 0200000000 is on the Year-End roster for the Fall term and not in the file	
Unable to Reconcile Year-End:2011-2012	
<a href="#">File Requests</a>	

*Sample if there were errors found*

9. Users may upload another year-end reconciliation file to fix any errors reported; **if ANY record rejects in the file the entire file is rejected**. The entire year-end must be processed as a whole.

**Go to MASSAid/Help to see the Reconcile Year-End File Layouts**

# File Requests







## 1 View Requested Files

File Requests displays all files that have been uploaded or downloaded. All files are available and can be accessed at any time.

Users can access files previously requested and re-download them.

To view requested files, follow these steps:

1. Select MASSAid then File Requests from the menu and the File Requests screen is displayed.

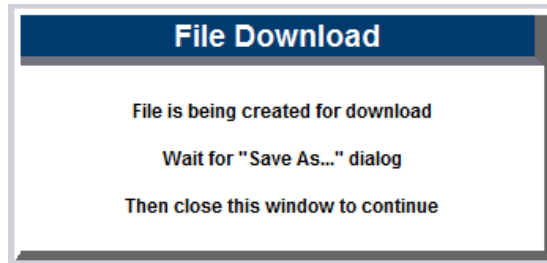
File Requests						
File Type	Request Date	Status	User Name	Aid Program	Term	Download
Download Year-End Reconciliation File for 2012-2013	07-03-2013	File request has been received and is awaiting processing.	jragency500	MASSGrant		
Download MASSGrant Information Roster	03-22-2013	The File has completed successfully.	patkerley	MASSGrant	Fall	
Download MASSGrant Information Roster	03-06-2013	The File has completed successfully.	jragency500	MASSGrant	Spring	
Download MASSGrant Information Roster	10-05-2012	The File has completed successfully.	patkerley	MASSGrant	Fall	
Download Reconcile Payments File for Batch B0100500	06-14-2012	The File has completed successfully.	jragency500	MASSGrant	Spring	
Download MASSGrant Information Roster	09-20-2011	The File has completed successfully.	patkerley	MASSGrant	Fall	

2. To view the details of a file, select the row associated to the file request.
  - 2.1 The File Processing Information screen is displayed.

File Processing Information	
File Date: 5/25/2011	
File Name: MASSAidInfoRoster_2011052507563070.txt	
Processing Messages	
Number of Records = 3	
<input type="button" value="File Requests"/>	

- 2.2 Click [File Requests] to return to the File Requests screen.

3. To re-download a file, select the Down Arrow icon.
  - 3.1 A File Download message displays and then the standard Open/Save/Save As dialog box displays.



- 3.2 Select [Open] to view the file.
  - 3.3 Select [Save] or [Save As] save the file.

# Quick View

## 1 MASSGrant Record

### 1.1 View MASSGrant Record

For each FAFSA processed by MASSAid, a MASSGrant record is created. By entering a student SSN in the SSN Quick View on the main menu, a list of existing MASSGrant records are displayed by academic year.

To view a student's MASSGrant record, follow these steps:

1. From the Quick View menu, select the academic year link for the MASSGrant record you wish to view.
2. The MASSGrant record displays (*shown in 3 pieces*)

MASSGrant Record Academic Year 2014 - 2015	
Status: <b>Eligible</b>	
Student Information: SSN XXX-XX-8825	
Name	SMITH, JOHN
Address	100 MAIN STREET
City, State, Zip	MEDFORD, MA 02155
Home Phone Number	(111)111-1111
Email Address	smith@email.email
Date of Birth	11/11/1990
Gender	Male
Driver's License State & Number	MA - 111111111

[UPDATE STUDENT INFORMATION](#) [ADD COMMENTS](#)



### Application Information

Institution	002217-00, STONEHILL COLLEGE	ISIR Date Override	
State of Legal Residence	MA	FAFSA Original Application Date	02/02/2014
Residence Date	06/01/2009	FAFSA Current Application Date	06/27/2014
Parent State of Legal Residence	MA	Clear All Problems Override	
Parent Residence Date	06/01/2009	Clear All Problems Expiration Date	
SSN Match	SSN, Name, and DOB match	Cleared All Problems Date	01/12/2015
SAR C Flag	No Flag Set	1st BA Override	
NSLDS Override		Grade Level	3rd Year/Junior
NSLDS Match	Student Not in Default or Overpayment	Bachelors Degree	No
Drug Override		Degree/Certificate	1st Bachelors Degree
Drug Conviction	No	Masters/Doctorate	No
Anticipated Fall Enrollment	Full-time	Citizenship Override	
Anticipated Spring Enrollment	Full-time	SSA Citizenship	US Citizen
Eligibility Override		Award Letter Date	07/18/2014
Return Mail Indicator		Original Ineligible Letter Date	
Decline Fall Award		Current Ineligible Letter Date	
Decline Spring Award		Insufficient Res Letter Date	
		Transaction Number	7
		NIL Eligibility Status	Eligible

**UPDATE APPLICATION INFORMATION**

### Financial Information

EFC	3491	Dependency Status	Dependent
Student Number in Household		Parent Number in Household	4
Student Number in College		Parent Number in College	1
Student Number of Exemptions	0	Parent Number of Exemptions	4
Student AGI	8,972	Parent AGI	51,090
Student Taxes Paid	286	Parent Taxes Paid	814
Student Tax Form	IRS 1040A or 1040EZ	Parent Tax Form	IRS 1040
Student Untaxed Total	00000201	Parent Untaxed Total	00000000
Student Additional Total	00000000	Parent Additional Total	00000785
Student Net Worth of Investments	0	Parent Net Worth of Investments	
Student Cash, Savings and Checking	600	Parent Cash, Savings and Checking	
Student Net Worth of Business/Inv Farm	0	Parent Net Worth of Business/Inv Farm	
Student Income Work	8,954	Mother Income Work	23,000
		Father Income Work	28,029

**UPDATE FINANCIAL INFORMATION**

### ISIR Comments

<b>Comment Code:</b>	<b>Comment:</b>
001	WHAT YOU MUST DO NOW (Use the checklist below to make sure that all of your issues are resolved.)
006	If you need to make corrections to your information, you may either make them online at <a href="http://www.fafsa.gov">www.fafsa.gov</a> , or by using this SAR. You must use your Federal Student Aid PIN to access your record online. If you need additional help with your SAR, contact your school's financial aid office or visit <a href="http://www.fafsa.gov">www.fafsa.gov</a> and click the "Help" icon on the FAFSA home page. If your mailing address or e-mail address changes, you can make the correction online or send in the correction on your SAR.

Reject Reason Codes					
No Reject Reasons to Display					
Payment Information					
Term	Institution	Institution Type	Status	Amount	
Fall	STONEHILL COLLEGE	Massachusetts Private 4-year	Paid	200.00	
Spring	STONEHILL COLLEGE	Massachusetts Private 4-year	ReadyToCertify	200.00	
				<b>Total</b>	<b>400.00</b>
Program Totals					
Total Semesters Used		6			
Total Cumulative Paid		2500.00			

If a student is eligible for the MASSGrant program, “Eligible” status is displayed. If a student is not eligible for the MASSGrant program, “Ineligible” status is displayed along with one or more ineligible reasons.

### 1.1.1 Add MASSGrant Comment on Student

Users with, at minimum, “Update” security level for MASSGrant can enter comments for display in the student transaction history.

To enter a comment on a student, follow these steps:

1. From the MASSGrant Record screen, click [Add Comment]. The Add Comments screen displays.

Record  
Academic Year 2014 - 2015

Add Comments

SAVE

CANCEL

2. Enter your comment text.
3. Click [Save].

The comment will display on the student’s transaction history screen.

## 1.2 Update MASSGrant Record

Users with, at minimum, “Update” security level for MASSGrant can update MASSGrant records for the current or a future academic year. Records from previous academic years are not updateable.

When a MASSGrant record is updated, the MASSAid system re-determines eligibility for that student. This may affect the status of the student, including the award amounts for any unpaid terms.

### 1.2.1 Update Student Information

To update the Student Information on a MASSGrant record, follow these steps:

1. From the MASSGrant Record screen, click [Update Student Information].
2. The Update Student Information screen displays pre-filled with existing information.

**MASSGrant Record**  
**Academic Year 2014 - 2015**  
**Update Student Information**  
**SSN XXX-XX-8825**

<b>Last Name</b>	SMITH	
<b>First Name</b>	JOHN	Middle <input style="width: 50px;" type="text"/>
<b>Address</b>	100 MAIN STREET	
<b>City</b>	MEDFORD	
<b>State</b>	MA <input type="button" value="v"/>	
<b>Zip Code</b>	02155	- <input style="width: 50px;" type="text"/>
Home Phone Number	(111)111-1111	
Email Address	smith@email.email	
Undeliverable Email Address	<input type="checkbox"/>	
<b>Date of Birth</b>	11/11/1990	
Gender	Male <input type="button" value="v"/>	
Drivers License State	MA <input type="button" value="v"/>	
Driver License Number	111111111	

3. Edit one or more of the following fields (fields in **bold** are required):
  - 3.1 **Last Name**
  - 3.2 **First Name**
  - 3.3 Middle Initial
  - 3.4 **Address**
  - 3.5 **City**
  - 3.6 **State**
  - 3.7 **Zip 5**
  - 3.8 Zip 4
  - 3.9 Home Phone Number
  - 3.10 Email Address
  - 3.11 Undeliverable Email Address (checkbox)
  - 3.12 **Date of Birth**
  - 3.13 Gender
  - 3.14 Drivers License State

3.15 Drivers License Number

4. Click [Save].

The updated MASSGrant record displays, and student eligibility is re-determined.

## 1.2.2 Update Application Information

To update the Application Information on a MASSGrant record, follow these steps:

1. From the MASSGrant Record screen, click [Update Application Information].
2. The Update Application Information screen displays pre-filled with existing information.

MASSGrant Record Academic Year 2014 - 2015 Update Application Information JOHN SMITH, XXX-XX-8825	
Institution	STONEHILL COLLEGE
State of Legal Residence	MA
Residence Date	06/01/2009
Parent State of Legal Residence	MA
Parent Residence Date	06/01/2009
<b>Anticipated Fall Enrollment</b>	Full-time
<b>Anticipated Spring Enrollment</b>	Full-time
Return Mail Indicator	
Decline Fall Award	<input type="checkbox"/>
Decline Spring Award	<input type="checkbox"/>
NIL Eligibility Status	Eligible
ISIR Date Override	
Clear All Problems Override	
Citizenship Override	<input type="checkbox"/>
NSLDS Override	<input type="checkbox"/>
Drug Override	<input type="checkbox"/>
1st BA Override	<input type="checkbox"/>
Grade Level	3rd Year/Junior
Bachelors Degree	No
Degree/Certificate	1st Bachelors Degree
Masters/Doctorate	No
SSN Match	SSN, Name, and DOB match
Eligibility Override	

**SAVE** **CANCEL**

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 Citizenship Override (checkbox)
- 3.2 NSLDS Override (checkbox)
- 3.3 Drug Override (checkbox)
- 3.4 1<sup>st</sup> BA Override (checkbox)
- 3.5 Grade Level
- 3.6 **Bachelors Degree**
- 3.7 **Degree/Certificate**
- 3.8 **Masters/Doctorate**

The updated MASSGrant record displays, and student eligibility is re-determined.

Note: Selecting any "override" checkbox will ignore the associated ineligible reason for the student for the academic year.

## 1.2.3 Update Financial Information

To update the Financial Information on a MASSGrant record, follow these steps:

1. From the MASSGrant Record screen, click [Update Financial Information].
2. The Update Financial Information screen displays pre-filled with existing information.

MASSGrant Record	
Academic Year 2014 - 2015	
Update Financial Information	
JOHN SMITH, XXX-XX-8825	
<b>Reason</b>	<input type="text"/>
EFC	3491
Student Number in Household	<input type="text"/>
Student Number in College	<input type="text"/>
Student Number of Exemptions	0
Student AGI	8972
Student Taxes Paid	286
Student Tax Form	IRS 1040A or 1040EZ <input type="text"/>
Student Untaxed Total	00000201
Student Additional Total	00000000
Student Net Worth of Investments	0
Student Cash, Savings and Checking	600
Student Net Worth of Business/Inv Farm	0
Student Income Work	8954
<b>Dependency Status</b>	Dependent <input type="text"/>
Parent Number in Household	4
Parent Number in College	1
Parent Number of Exemptions	4
Parent AGI	51090
Parent Taxes Paid	814
Parent Tax Form	IRS 1040 <input type="text"/>
Parent Untaxed Total	00000000
Parent Additional Total	00000785
Parent Net Worth of Investments	
Parent Cash, Savings and Checking	
Parent Net Worth of Business/Inv Farm	
Mother Income Work	23000
Father Income Work	28029

**SAVE** **CANCEL**

3. Edit one or more of the following fields (fields in **bold** are required):

3.1 **Reason**

3.2 EFC

Note: If the EFC is updated, at least one additional field (other than Reason) must be updated.

3.3 **Dependency Status**

3.4 Student Number in Household

3.5 Parent Number in Household

3.6 Student Number in College

3.7 Parent Number in College

3.8 Student Number of Exemptions

3.9 Parent Number of Exemptions

- 3.10 Student AGI
- 3.11 Parent AGI
- 3.12 Student Taxes Paid
- 3.13 Parent Taxes Paid
- 3.14 Student Tax Form
- 3.15 Parent Tax Form
- 3.16 Student Untaxed Total
- 3.17 Parent Untaxed Total
- 3.18 Student Additional Total
- 3.19 Parent Additional Total
- 3.20 Student Net Worth of Investments
- 3.21 Parent Net Worth of Investments
- 3.22 Student Cash, Savings and Checking
- 3.23 Parent Cash, Savings and Checking
- 3.24 Student Net Worth Business/Inv Farm
- 3.25 Parent Net Worth Business/Inv Farm
- 3.26 Student Income Work
- 3.27 Mother Income Work
- 3.28 Father Income Work

---

*Note: All 'Parent' fields are disabled if the student's Dependency Status is "Independent."*

---

4. Click [Save].

The updated MASSGrant record displays, and student eligibility is re-determined.

# 2 No Interest Loan Record

## 2.1 View No Interest Loan Record

As No Interest Loan promissory notes are created, NIL records are created. By entering a student SSN in the SSN Quick View on the main menu, a list of existing NIL records are displayed by academic year.

To view a student's NIL record, follow these steps:

1. From the Quick View menu, select the academic year link for the NIL record you wish to view.
2. The No Interest Loan Record displays (*shown in 2 pieces*)

**No Interest Loan Record**  
**Academic Year 2014 - 2015**

Status: **Eligible**

P-Note Status: **Disbursed**

[RE-PRINT P-NOTE](#)

**Student Information: SSN XXX-XX-8825**

Name	SMITH, JOHN
SSN	888-88-8825
Address	100 MAIN STREET
City, State, Zip	MEDFORD, MA 02155
Home Phone Number	(111)111-1111
Email Address	smith@email.email
Date of Birth	11/11/1990

[ADD COMMENTS](#)

**Application Information**

Institution	002217-00, STONEHILL COLLEGE	P-Note Created Date	09/15/2014
Dependency Status	Dependent	P-Note Received Date	10/17/2014
EFC	3491	P-Note Approved Date	10/23/2014
Final Disclosure Sent Date	10/23/2014	Right to Cancel Date	10/29/2014
1st Disbursement Letter Sent Date	10/30/2014	P-Note Unique ID	P006691

Promissory Note Information				
Loan Amount	\$4,000.00	Disbursement Preference	Fall, Spring	
Loan Period Begin Date	08/27/2014	Fall Disbursement Date	09/15/2014	
Loan Period End Date	05/08/2015	Spring Disbursement Date	01/23/2015	
Graduation Date	05/20/2016	Summer Disbursement Date		
Reference Information				
<u>Reference 1</u>		<u>Reference 2</u>		
Name	SMITH, Mom	Name	SMITH, DAD	
Address	100 MAIN STREET	Address	100 MAIN STREET	
Address 2		Address 2		
City, State, Zip	MEDFORD, MA 02155	City, State, Zip	MEDFORD, MA 02115	
Phone Number	(111)111-1111	Phone Number	(222)222-2222	
Disbursements Information				
Term	Institution	Disbursement Date	Status	Amount
Fall	STONEHILL COLLEGE	09/15/2014	Paid	\$2,000.00
Spring	STONEHILL COLLEGE	01/23/2015	ReadyToPay <a href="#">Cancel</a>	\$2,000.00
<b>Total</b>				<b>\$4,000.00</b>
Program Totals				
<b>Total Cumulative Award Paid</b>		<b>\$10,000.00</b>		

**PROCESS LOAN INCREASE**

The NIL record contains student, application, reference and disbursement information relative to the academic year selected.

### 2.1.1 Add NIL Comments on Student

Users with, at minimum, "Update" security level for NIL can enter comments for display in the student transaction history.

To enter a comment on a student, follow these steps:

1. From the NIL Record screen, click [Add Comments]. The Add Comments screen displays.

Add Comments

Comments:

SAVE

CANCEL

2. Enter your comment text.

3. Click [Save].

The comment will display on the student's transaction history screen.

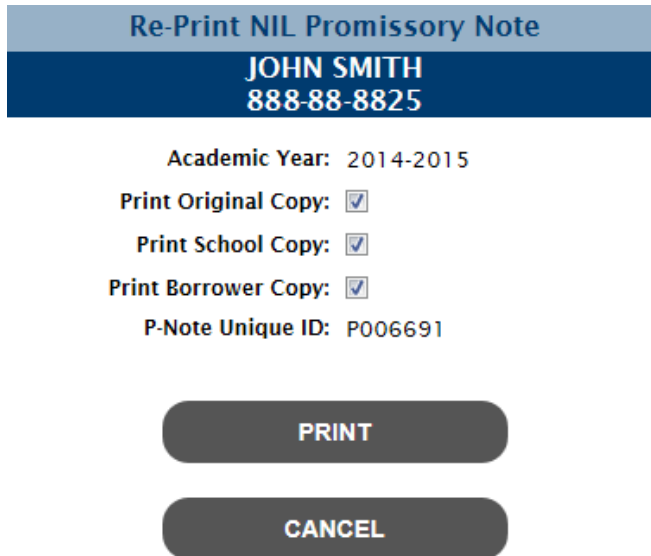


## 2.1.2 Re-Print Promissory Note

Users can re-print a student's promissory note from the NIL record.

To re-print a note, follow these steps:

1. From the NIL Record screen, click [Re-Print P-Note]. The Re-Print NIL Promissory Note screen displays.



Re-Print NIL Promissory Note

**JOHN SMITH**  
**888-88-8825**

Academic Year: 2014-2015

Print Original Copy:

Print School Copy:

Print Borrower Copy:

P-Note Unique ID: P006691

PRINT

CANCEL

2. Select one or more copies to re-print.
3. Click [Print].

The student's promissory note will display as a .pdf document.

## 2.1.3 Cancel Loan

Users can cancel a student's No Interest Loan from the NIL record.

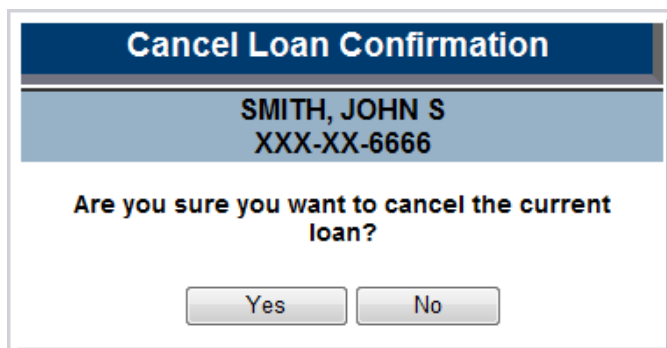
---

*Note: The [Cancel Loan] button is only displayed if the loan is not yet disbursed.*

---

To cancel a No Interest Loan, follow these steps:

1. From the NIL Record screen, click [Cancel Loan]. The Cancel Loan Confirmation screen displays.



Cancel Loan Confirmation

**SMITH, JOHN S**  
**XXX-XX-6666**

Are you sure you want to cancel the current loan?

Yes No

2. Click [Yes].

The student's No Interest Loan will be canceled; all disbursements will be canceled and set to zero.

## 2.1.4 Cancel Disbursement

Users can a No Interest Loan disbursement from the NIL record.

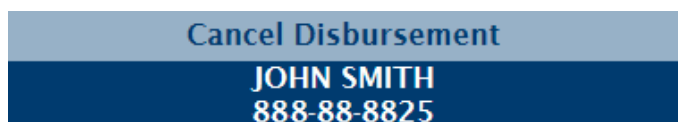
---

*Note: The Cancel link is only displayed next to a disbursement if it is not yet disbursed.*

---

To cancel a disbursement, follow these steps:

1. From the NIL Record screen, select the Cancel link next to the disbursement to be canceled. The Cancel Disbursement screen displays.



Term Spring  
Amount \$2,000.00  
Disbursement Date 01/23/2015

Select [Save] to cancel the above disbursement.



2. Click [Save].

The student's disbursement will be canceled and set to zero.

---

## 2.2 Process No Interest Loan Increase

Users with, at minimum, "Update" security level for NIL can process loan increases for students with an existing No Interest Loan.

To process a loan increase, follow these steps:

1. From the NIL Record screen, click [Process Loan Increase].
2. The NIL Promissory Note Increase screen displays pre-filled with existing information.

Student Information	
Name	JOHN SMITH
SSN	010-78-8825
Address	100 MAIN STREET
City, State, Zip	MEDFORD,MA 02155-
Home Phone Number	(111)111-1111
Email Address	smith@email.email
Dependency Status	Dependent
Current Year Loans	\$4,000

Promissory Note Information	
Loan Amount	<input type="text" value="4000"/> from 1000 to 4000
Disbursement Preference	Fall, Spring <input type="button" value="v"/>
Loan Period Begin Date	8 / 27 / 2014
Disbursement Date (Fall)	9 / 15 / 2014
Loan Period End Date	5 / 8 / 2015
Disbursement Date (Spring)	1 / 23 / 2015
Graduation Date	5 / 20 / 2016

School Certification for FAO Information	
FAO Name	<input type="text" value="John Doe"/>
FAO Title	Assistant Director for Loans
Phone Number for PNote	(222)222-2222
Phone Number for OFSA to Contact	<input type="text"/>
School Address for PNote	320 WASHINGTON ST
School City for PNote	EASTON
School State for PNote	Massachusetts <input type="button" value="v"/>
School Zip for PNote	02357 - 0000

By clicking [Save] a promissory note will get generated for this loan increase.

**SAVE**

**CANCEL**

3. Enter/edit one or more of the following fields (fields in **bold** are required):
  - 3.1 **Home Phone Number**
  - 3.2 **Email Address**
  - 3.3 **Loan Amount**
  - 3.4 **Disbursement Preference**
  - 3.5 **Loan Period Begin Date**
  - 3.6 **Loan Period End Date**
  - 3.7 Fall Disbursement Date (required based on Disbursement Preference selected)

- 3.8 Spring Disbursement Date (required based on Disbursement Preference selected)
  - 3.9 Summer Disbursement Date (required based on Disbursement Preference selected)
  - 3.10 **Graduation Date**
  - 3.11 **FAO Name**
  - 3.12 **FAO Title**
  - 3.13 **Phone Number for PNote**
  - 3.14 Phone Number for OSFA to Contact
  - 3.15 **School Address for PNote**
  - 3.16 **School City for PNote**
  - 3.17 **School State for PNote**
  - 3.18 **School Zip for PNote**
4. Click [Save].

A new promissory note for the loan increase is created for the student. The original note, school copy and student copy of the Promissory Note and the Loan Offer are generated as a .PDF.

# 3 Early Childhood Education Scholarship Record

## 3.1 View ECE Record

Students apply for an ECE scholarship via the Student Portal. By entering a student SSN in the SSN Quick View on the main menu, a list of existing ECE records are displayed by academic year.

To view a student's ECE record, follow these steps:

1. From the Quick View menu, select the academic year link for the ECE record you wish to view.
2. The ECE record displays (*shown in 2 pieces*)

The screenshot displays the ECE record interface. At the top, a blue header reads "Early Childhood Educators Scholarship Academic Year 2014-2015". Below this, the status is "Eligible". A "PRINT LETTER" button is on the right. A dark blue header below reads "Student Information: SSN XXX-XX-8825". Underneath is a table of student details. At the bottom, there are two buttons: "UPDATE STUDENT INFORMATION" and "ADD COMMENTS".

Early Childhood Educators Scholarship Academic Year 2014-2015	
Status: Eligible	
PRINT LETTER	
Student Information: SSN XXX-XX-8825	
Name	SMITH, JOHN
Address	100 MAIN STREET
City, State, Zip	MEDFORD, MA 02155
Home Phone Number	(111)111-1111
Email Address	smith@email.email
Date of Birth	11/11/1990
Gender	Male
UPDATE STUDENT INFORMATION	
ADD COMMENTS	

Application Information			
Institution	002217-00, STONEHILL COLLEGE	Fall Anticipated Credits (Initial / Updated)	6 / 6
Major	Child Development	Spring Anticipated Credits (Initial / Updated)	6 / 6
Expected Degree Month	May	Summer 1 Anticipated Credits (Initial / Updated)	0 / 0
Expected Degree Year	2016	Summer 2 Anticipated Credits (Initial / Updated)	0 / 0
ECE Application Date	1/12/2015	Award Letter Date	
ECE Application Date Override		Summer Award Letter Date	
DEEC Approved	Yes	Original Ineligible Letter Date	
DEEC Override		Current Ineligible Letter Date	
Employment Override			

State of Legal Residence	Massachusetts	FAFSA Original Application Date	2/2/2014
Residence Date	6/1/2009	FAFSA Current Application Date	6/27/2014
Parent State of Legal Residence	Massachusetts	Clear All Problems Override	
Parent Residence Date	6/1/2009	Clear All Problems Expiration Date	
SSN Match	SSN, Name, and DOB match	Cleared All Problems Date	1/14/2015
SAR C Flag		1st BA Override	
NSLDS Override		Grade Level	3rd Year/Junior
NSLDS Match	Student Not in Default or Overpayment	Bachelors Degree	No
Drug Override		Degree/Certificate	1st Bachelors Degree
Drug Conviction		Masters/Doctorate	No
Citizenship Override		SSA Citizenship	US Citizen

**UPDATE APPLICATION INFORMATION**

Payment Information				
Term	Institution	Institution Type	Status	Amount
Fall	STONEHILL COLLEGE	Massachusetts Private 4-year	ReadyToCertify	\$3,000.00
Spring	STONEHILL COLLEGE	Massachusetts Private 4-year	ReadyToCertify	\$1,500.00
			<b>Total</b>	<b>\$4,500.00</b>
<b>Program Totals</b>				
Total Cumulative Paid				

If a student is eligible for the ECE program, “Eligible” status is displayed. If a student is not eligible for the ECE program, “Ineligible” status is displayed along with one or more ineligible reasons.

### 3.1.1 Add ECE Comment on Student

Users with, at minimum, “Update” security level for ECE can enter comments for display in the student transaction history.

To enter a comment on a student, follow these steps:

1. From the ECE Record screen, click [Add Comments]. The Add Comments screen displays.

2. Enter your comment text.
3. Click [Save].

The comment will display on the student’s transaction history screen.

### 3.1.2 Print Letter

Agency users can single-print a student’s award status (eligible/ineligible) letter from the ECE record.

To print a letter, follow these steps:

1. From the ECE Record screen, click [Print Letter]. The Print Letter screen displays.

2. Enter a letter date.
3. Click [Print].

The student’s Eligible or Ineligible letter will display as a .pdf document.

---

## 3.2 Update ECE Record

Users with, at minimum, “Update” security level for ECE can update ECE records for the current or a future academic year. Records from previous academic years are not updateable.

When a ECE record is updated, the MASSAid system re-determines eligibility for that student. This may affect the status of the student, including the award amounts for any unpaid terms.

### 3.2.1 Update Student Information

To update the Student Information on a ECE record, follow these steps:

1. From the ECE Record screen, click [Update Student Information].
2. The Update Student Information screen displays pre-filled with existing information.

Early Childhood Educators Scholarship Academic Year 2014-2015		
Update Student Information JOHN SMITH, XXX-XX-8825		
<b>Last Name</b>	SMITH	
<b>First Name</b>	JOHN	Middle
<b>Address</b>	100 MAIN STREET	
<b>City</b>	MEDFORD	
<b>State</b>	Massachusetts ▼	
<b>Zip</b>	02155 -	
<b>Home Phone Number</b>	(111)111-1111	
<b>Email Address</b>	smith@email.email	
<b>Date of Birth</b>	11/11/1990	
<b>Gender</b>	Male ▼	

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 **Last Name**
- 3.2 **First Name**
- 3.3 Middle Initial
- 3.4 **Address**
- 3.5 **City**
- 3.6 **State**
- 3.7 **Zip 5**
- 3.8 Zip 4
- 3.9 **Home Phone Number**
- 3.10 Email Address
- 3.11 **Date of Birth**
- 3.12 Gender

4. Click [Save].

The updated ECE record displays, and student eligibility is re-determined.

### 3.2.2 Update Application Information

To update the Application Information on a ECE record, follow these steps:

1. From the ECE Record screen, click [Update Application Information].



2. The Update Application Information screen displays pre-filled with existing information.

Early Childhood Educators Scholarship Academic Year 2014-2015	
Update Application Information JOHN SMITH, XXX-XX-8825	
State of Legal Residence	Massachusetts <input type="text"/>
Residence Date	6/1/2009 <input type="text"/>
Parent State of Legal Residence	Massachusetts <input type="text"/>
Parent Residence Date	6/1/2009 <input type="text"/>
SSN Match	SSN, Name, and DOB match <input type="text"/>
Degree/Certificate	1st Bachelors Degree <input type="text"/>
Masters/Doctorate	No <input type="text"/>
Citizenship Override	<input type="checkbox"/>
NSLDS Override	<input type="checkbox"/>
Drug Override	<input type="checkbox"/>
1st BA Override	<input type="checkbox"/>
Grade Level	3rd Year/Junior <input type="text"/>
Bachelors Degree	No <input type="text"/>

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 Degree/Certificate
- 3.2 Masters/Doctorate
- 3.3 Citizenship Override (checkbox)
- 3.4 NSLDS Override (checkbox)
- 3.5 Drug Override (checkbox)
- 3.6 1<sup>st</sup> BA Override (checkbox)
- 3.7 Grade Level
- 3.8 Bachelors Degree

The updated ECE record displays, and student eligibility is re-determined.

---

*Note: Selecting any "override" checkbox will ignore the associated ineligible reason for the student for the academic year.*

---

# 4 Paraprofessional Teacher Preparation Grant Record

## 4.1 View PTPG Record

Students apply for a PTPG scholarship via the Student Portal. By entering a student SSN in the SSN Quick View on the main menu, a list of existing PTPG records are displayed by academic year.

To view a student's PTPG record, follow these steps:

1. From the Quick View menu, select the academic year link for the PTPG record you wish to view.
2. The PTPG record displays (*shown in 2 pieces*)

Paraprofessional Teacher Preparation Grant Academic Year 2014-2015	
Status:	Eligible
<a href="#">PRINT LETTER</a>	
Student Information: SSN XXX-XX-8825	
Name	SMITH, JOHN
Address	100 MAIN STREET
City, State, Zip	MEDFORD, MA 02155
Home Phone Number	(111)111-1111
Email Address	smith@email.email
Date of Birth	11/11/1990
Gender	Male
<a href="#">UPDATE STUDENT INFORMATION</a> <a href="#">ADD COMMENTS</a>	

Application Information			
Institution	002217-00, STONEHILL COLLEGE	Fall Anticipated Credits (Initial / Updated)	6 / 6
Major	Early Childhood Education	Spring Anticipated Credits (Initial / Updated)	6 / 6
Expected Degree Month	May	Summer 1 Anticipated Credits (Initial / Updated)	0 / 0
Expected Degree Year	2016	Summer 2 Anticipated Credits (Initial / Updated)	0 / 0
PTPG Application Date	1/12/2015	Award Letter Date	
PTPG Application Date Override		Summer Award Letter Date	
Employment Override		Original Ineligible Letter Date	
		Current Ineligible Letter Date	

State of Legal Residence	Massachusetts	FAFSA Original Application Date	2/2/2014
Residence Date	6/1/2009	FAFSA Current Application Date	6/27/2014
Parent State of Legal Residence	Massachusetts	Clear All Problems Override	
Parent Residence Date	6/1/2009	Clear All Problems Expiration Date	
SSN Match	SSN, Name, and DOB match	Cleared All Problems Date	1/14/2015
SAR C Flag		1st BA Override	
NSLDS Override		Grade Level	3rd Year/Junior
NSLDS Match	Student Not in Default or Overpayment	Bachelors Degree	No
Drug Override		Degree/Certificate	1st Bachelors Degree
Drug Conviction		Masters/Doctorate	No
Citizenship Override		SSA Citizenship	US Citizen

**UPDATE APPLICATION INFORMATION**

Payment Information				
Term	Institution	Institution Type	Status	Amount
Fall	STONEHILL COLLEGE	Massachusetts Private 4-year	ReadyToCertify	\$3,750.00
Spring	STONEHILL COLLEGE	Massachusetts Private 4-year	ReadyToCertify	\$3,750.00
			<b>Total</b>	<b>\$7,500.00</b>
<b>Program Totals</b>				
Total Cumulative Paid				

If a student is eligible for the PTPG program, “Eligible” status is displayed. If a student is not eligible for the PTPG program, “Ineligible” status is displayed along with one or more ineligible reasons.

### 4.1.1 Add PTPG Comment on Student

Users with, at minimum, “Update” security level for PTPG can enter comments for display in the student transaction history.

To enter a comment on a student, follow these steps:

1. From the PTPG Record screen, click [Add Comments]. The Add Comments screen displays.

2. Enter your comment text.
3. Click [Save].

The comment will display on the student's transaction history screen.

### 4.1.2 Print Letter

Agency users can single-print a student's award status (eligible/ineligible) letter from the PTPG record.

To print a letter, follow these steps:

1. From the PTPG Record screen, click [Print Letter]. The Print Letter screen displays.

2. Enter a letter date.
3. Click [Print].

The student's Eligible or Ineligible letter will display as a .pdf document.

---

## 4.2 Update PTPG Record

Users with, at minimum, "Update" security level for PTPG can update PTPG records for the current or a future academic year. Records from previous academic years are not updateable.

When a PTPG record is updated, the MASSAid system re-determines eligibility for that student. This may affect the status of the student, including the award amounts for any unpaid terms.

### 4.2.1 Update Student Information

To update the Student Information on a PTPG record, follow these steps:

1. From the PTPG Record screen, click [Update Student Information].
2. The Update Student Information screen displays pre-filled with existing information.

Paraprofessional Teacher Preparation Grant Academic Year 2014-2015		
Update Student Information JOHN SMITH, XXX-XX-8825		
<b>Last Name</b>	SMITH	
<b>First Name</b>	JOHN	Middle
<b>Address</b>	100 MAIN STREET	
<b>City</b>	MEDFORD	
<b>State</b>	Massachusetts	
<b>Zip</b>	02155	
<b>Home Phone Number</b>	(111)111-1111	
<b>Email Address</b>	smith@email.email	
<b>Date of Birth</b>	11/11/1990	
<b>Gender</b>	Male	

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 **Last Name**
- 3.2 **First Name**
- 3.3 Middle Initial
- 3.4 **Address**
- 3.5 **City**
- 3.6 **State**
- 3.7 **Zip 5**
- 3.8 Zip 4
- 3.9 **Home Phone Number**
- 3.10 Email Address
- 3.11 **Date of Birth**
- 3.12 Gender

4. Click [Save].

The updated ECE record displays, and student eligibility is re-determined.

## 4.2.2 Update Application Information

To update the Application Information on a PTPG record, follow these steps:

1. From the PTPG Record screen, click [Update Application Information].

2. The Update Application Information screen displays pre-filled with existing information.

Paraprofessional Teacher Preparation Grant Academic Year 2014-2015	
Update Application Information JOHN SMITH, XXX-XX-8825	
State of Legal Residence	Massachusetts <input type="text"/>
Residence Date	6/1/2009 <input type="text"/>
Parent State of Legal Residence	Massachusetts <input type="text"/>
Parent Residence Date	6/1/2009 <input type="text"/>
SSN Match	SSN, Name, and DOB match <input type="text"/>
Degree/Certificate	1st Bachelors Degree <input type="text"/>
Masters/Doctorate	No <input type="text"/>
Citizenship Override	<input type="checkbox"/>
NSLDS Override	<input type="checkbox"/>
Drug Override	<input type="checkbox"/>
1st BA Override	<input type="checkbox"/>
Grade Level	3rd Year/Junior <input type="text"/>
Bachelors Degree	No <input type="text"/>

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 Degree/Certificate
- 3.2 Masters/Doctorate
- 3.3 Citizenship Override (checkbox)
- 3.4 NSLDS Override (checkbox)
- 3.5 Drug Override (checkbox)
- 3.6 1<sup>st</sup> BA Override (checkbox)
- 3.7 Grade Level
- 3.8 Bachelors Degree

The updated PTPG record displays, and student eligibility is re-determined.

---

*Note: Selecting any "override" checkbox will ignore the associated ineligible reason for the student for the academic year.*

---

# 5 GEAR UP Scholarship Record

## 5.1 View GEAR UP Record

By entering a student SSN in the SSN Quick View on the main menu, a list of existing GEAR UP records are displayed by academic year.

To view a student's GEAR UP record, follow these steps:

1. From the Quick View menu, select the academic year link for the GEAR UP record you wish to view.
2. The GEAR UP record displays (*shown in 2 pieces*)

**GEAR UP Scholarship  
Academic Year 2014 - 2015**

Status: Eligible

PRINT LETTER

**Student Information: SSN XXX-XX-8825**

Name	SMITH,JOHN
Address	100 MAIN STREET
City,State,Zip	MEDFORD,MA 02155
Home Phone Number	(111)111-1111
Email Address	smith@email.email
Date Of Birth	11/11/1994
Gender	Male

UPDATE STUDENT INFORMATION
ADD COMMENTS

**Application Information**

Institution	002217-00, STONEHILL COLLEGE	Award Letter Date	
State of Legal Residence	MA	FAFSA Original Application Date	02/02/2014
Residence Date	06/01/2009	FAFSA Current Application Date	06/27/2014
Parent Sate Of Legal Residence	MA	1st BA Override	
Parent Residence Date	06/01/2009	Grade Level	3rd Year/Junior
SSN Match	SSN, Name, and DOB match	Bachelors Degree	No
SAR C Flag	No Flag Set	Degree/Certificate	1st Bachelors Degree
NSLDS Override		Master/Doctorate	No
NSLDS Match	Student Not in Default or Overpayment	Citizenship Override	
Drug Override		SSA Citizenship	US Citizen
Drug Conviction	No	Dependency Status	Dependent

UPDATE APPLICATION INFORMATION

Financial Aid Information				
Cost of Attendance	40,000		Fall Enrollment	Full-time
Estimated Family Contribution (EFC)	3,491		Spring Enrollment	Full-time
MASSGrant	400		Scholar-Internship Match Fund	0
Gilbert Grant	0		Fee Waiver	0
Cash Grant	0		PELL Grant	500
Part-Time Grant	0		Federal SEOG	0
Foster Child Grant	0		Federal Smart Grant	0
Paraprofessional Teacher Preparation Grant	0		Academic Competitiveness Grant	0
Public Service Grant	0		Federal Work Study	0
Christian Herter Memorial Scholarship	0		No Interest Loan	0
Early Childhood Educators Scholarship	0		Direct Subsidized Loan	0
John and Abigail Adams Scholarship	0		Direct Unsubsidized Loan	0
Tuition Waiver	0		PLUS	0
National Guard Tuition Waiver	0		Federal Perkins Loan	0
National Guard Tuition/Fee Assistance	0		Institutional Grants/Scholarships	0
Massachusetts Educational Rewards Grant	0		Institutional Loan	0
Math & Science Teachers Scholarship	0		TEACH Grant	0
High Demand Scholarship	0		Iraq and Afghanistan Service Grant	0
Completion Incentive Grant	0		Federal Family Education Loan Subsidized	0
Internship Incentive Program Grant	0		Federal Family Education Loan Unsubsidized	0
Other Institutional Aid	0			
Other Federal ()	0			
Other State ()	0			
Other Outside ()	0			
Other ()	0			

UPDATE FINANCIAL AID INFORMATION

Payment Information				
Term	Institution	Institution Type	Status	Amount
Fall	STONEHILL COLLEGE	Massachusetts Private 4-year	ReadyToCertify	500.00
Spring	STONEHILL COLLEGE	Massachusetts Private 4-year	ReadyToCertify	500.00
			<b>Total</b>	<b>1000.00</b>
<b>Total Cumulative Paid</b>				0.00

If a student is eligible for the GEAR UP program, “Eligible” status is displayed. If a student is not eligible for the GEAR UP program, “Ineligible” status is displayed along with one or more ineligible reasons.

### 5.1.1 Add GEAR UP Comment on Student

Users with, at minimum, “Update” security level for GEAR UP can enter comments for display in the student transaction history.

To enter a comment on a student, follow these steps:

1. From the GEAR UP Record screen, click [Add Comments]. The Add Comments screen displays.



GEAR UP Scholarship Record  
Academic Year 2014 - 2015

**Add Comments**

SAVE
CANCEL

2. Enter your comment text.

3. Click [Save].

The comment will display on the student’s transaction history screen.

### 5.1.2 Print Letter

Agency users can single-print a student’s award letter from the GEAR UP record.

---

*Note: The [Print Letter] button is only displayed if the student is ‘Eligible’ for the GEAR UP scholarship.*

---

To print a letter, follow these steps:

1. From the GEAR UP Record screen, click [Print Letter]. The Print Letter screen displays.

**Print Letter**

**JOHN SMITH**  
**XXX-XX-8825**

Academic Year: 2014-2015

Letter Type: Award

Letter Date:

PRINT
CANCEL

2. Enter a letter date.

3. Click [Print].

The student’s award letter will display as a .pdf document.

---

## 5.2 Update GEAR UP Record

Users with, at minimum, “Update” security level for GEAR UP can update GEAR UP records for the current or a future academic year. Records from previous academic years are not updateable.

When a GEAR UP record is updated, the MASSAid system re-determines eligibility for that student. This may affect the status of the student, including the award amounts for any unpaid terms.

## 5.2.1 Update Student Information

To update the Student Information on a GEAR UP record, follow these steps:

1. From the GEAR UP Record screen, click [Update Student Information].
2. The Update Student Information screen displays pre-filled with existing information.

GEAR UP Scholarship Academic Year 2014 - 2015	
Update Student Information SMITH,JOHN , XXX-XX-8825	
Last Name	SMITH
First Name	JOHN
Middle	
Address	100 MAIN STREET
City	MEDFORD
State	MA <input type="button" value="v"/>
Zip Code	02155 <input type="text"/>
Home Phone Number	(111)111-1111
Email Address	smith@email.email
Date Of Birth	11/11/1994
Gender	Male <input type="button" value="v"/>

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 **Last Name**
- 3.2 **First Name**
- 3.3 Middle Initial
- 3.4 **Address**
- 3.5 **City**
- 3.6 **State**
- 3.7 **Zip 5**
- 3.8 Zip 4
- 3.9 **Home Phone Number**
- 3.10 Email Address
- 3.11 **Date of Birth**
- 3.12 Gender

4. Click [Save].

The updated GEAR UP record displays, and student eligibility is re-determined.

## 5.2.2 Update Application Information

To update the Application Information on a GEAR UP record, follow these steps:

1. From the GEAR UP Record screen, click [Update Application Information].
2. The Update Application Information screen displays pre-filled with existing information.

GEAR UP Scholarship Academic Year 2014 - 2015	
Update Application Information SMITH,JOHN , XXX-XX-8825	
State of Legal Residence	MA
Residence Date	06/01/2009
Parent State Of Legal Residence	MA
Parent Residence Date	06/01/2009
SSN Match	SSN, Name, and DOB match
Master/Doctorate	No <input type="checkbox"/>
Degree/Certificate	1st Bachelors Degree <input type="checkbox"/>
Citizenship Override	<input type="checkbox"/>
NSLDS Override	<input type="checkbox"/>
Drug Override	<input type="checkbox"/>
1st BA Override	<input type="checkbox"/>
Bachelors Degree	No <input type="checkbox"/>
Grade Level	3rd Year/Junior <input type="checkbox"/>

**SAVE**      **CANCEL**

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 **Masters/Doctorate**
- 3.2 **Degree/Certificate**
- 3.3 Citizenship Override (checkbox)
- 3.4 NSLDS Override (checkbox)
- 3.5 Drug Override (checkbox)
- 3.6 1<sup>st</sup> BA Override (checkbox)
- 3.7 **Bachelors Degree**
- 3.8 **Grade Level**

The updated GEAR UP record displays, and student eligibility is re-determined.

---

*Note: Selecting any "override" checkbox will ignore the associated ineligible reason for the student for the academic year.*

---

## 5.2.3 Update Financial Aid Information

To update the Financial Aid Information on a GEAR UP record, follow these steps:

1. From the GEAR UP Record screen, click [Update Financial Aid Information].
2. The Update Financial Aid Information screen displays pre-filled with existing information.

**Update Financial Information**  
**JOHN SMITH, XXX-XX-8825**  
**STONEHILL COLLEGE**

	<b>Fall Enrollment</b>	Full-time	<input type="button" value="v"/>
	<b>Spring Enrollment</b>	Full-time	<input type="button" value="v"/>
<b>Cost of Attendance</b>	<input type="text" value="40000"/>		
<b>Estimated Family Contribution (EFC)</b>	<input type="text" value="3491"/>		
MASSGrant	<input type="text" value="400"/>	Scholar-Internship Match Fund	<input type="text" value="0"/>
Gilbert Grant	<input type="text" value="0"/>	Fee Waiver	<input type="text" value="0"/>
Cash Grant	<input type="text" value="0"/>	PELL Grant	<input type="text" value="500"/>
Part-Time Grant	<input type="text" value="0"/>	Federal SEOG	<input type="text" value="0"/>
Foster Child Grant	<input type="text" value="0"/>	Federal Smart Grant	<input type="text" value="0"/>
Paraprofessional Teacher Preparation Grant	<input type="text" value="0"/>	Academic Competitiveness Grant	<input type="text" value="0"/>
Public Service Grant	<input type="text" value="0"/>	Federal Work Study	<input type="text" value="0"/>
Christian Herter Memorial Scholarship	<input type="text" value="0"/>	No Interest Loan	<input type="text" value="0"/>
Early Childhood Educators Scholarship	<input type="text" value="0"/>	Direct Subsidized Loan	<input type="text" value="0"/>
John and Abigail Adams Scholarship	<input type="text" value="0"/>	Direct Unsubsidized Loan	<input type="text" value="0"/>
Tuition Waiver	<input type="text" value="0"/>	PLUS	<input type="text" value="0"/>
National Guard Tuition Waiver	<input type="text" value="0"/>	Federal Perkins Loan	<input type="text" value="0"/>
National Guard Tuition/Fee Assistance	<input type="text" value="0"/>	Institutional Grants/Scholarships	<input type="text" value="0"/>
Massachusetts Educational Rewards Grants	<input type="text" value="0"/>	Institutional Loan	<input type="text" value="0"/>
Math & Science Teachers Scholarship	<input type="text" value="0"/>	TEACH Grant	<input type="text" value="0"/>
High Demand Scholarship	<input type="text" value="0"/>	Iraq and Afghanistan Service Grant	<input type="text" value="0"/>
Completion Incentive Grant	<input type="text" value="0"/>	Federal Family Education Loan Subsidized	<input type="text" value="0"/>
Internship Incentive Program Grant	<input type="text" value="0"/>	Federal Family Education Loan Unsubsidized	<input type="text" value="0"/>
Other Institutional Aid	<input type="text" value="0"/>		
Other Federal (Please Specify)	<input type="text" value="0"/>		
Other State (Please Specify)	<input type="text" value="0"/>		
Other Outside (Please Specify)	<input type="text" value="0"/>		
Other (Please Specify)	<input type="text" value="0"/>		

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 **Fall Enrollment**
  - 3.1.1 Full-time
  - 3.1.2 ¾ time
  - 3.1.3 Half-time
  - 3.1.4 Less Than Half-time
  - 3.1.5 Not Enrolled

- 3.2 **Spring Enrollment**
  - 3.2.1 Full-time
  - 3.2.2 ¾ time
  - 3.2.3 Half-time
  - 3.2.4 Less Than Half-time
  - 3.2.5 Not Enrolled

- 3.3 **Cost of Attendance**

- 3.4 **Estimated Family Contribution (EFC)**

---

*Note: If a student's EFC value is updated, the user will be redirected to the EFC Change screen to enter the supporting EFC Change data.*

---

- 3.5 MASSGrant (this field is **required** if the EFC meets the Pell/MASSGrant EFC cutoff on the GEAR UP Award Rules)
- 3.6 Gilbert Grant
- 3.7 Cash Grant
- 3.8 Part-Time Grant
- 3.9 Foster Child Grant
- 3.10 Teacher Preparation Grant
- 3.11 Public Service Grant
- 3.12 Christian Herter Memorial Scholarship
- 3.13 Early Childhood Educators Scholarship
- 3.14 John and Abigail Adams Scholarship
- 3.15 Tuition Waiver
- 3.16 National Guard Tuition Waiver
- 3.17 National Guard Tuition/Fee Assistance
- 3.18 Massachusetts Educational Rewards Grant
- 3.19 Math & Science Teachers Scholarship
- 3.20 High Demand Scholarship
- 3.21 Completion Incentive Grant
- 3.22 Scholar-Internship Match Fund

- 3.23 GEAR UP Scholarship (display only field; not updateable)
  - 3.24 PELL Grant (this field is **required** if the EFC meets the Pell/MASSGrant EFC cutoff on the GEAR UP Award Rules)
  - 3.25 Federal SEOG
  - 3.26 Federal Smart Grant
  - 3.27 Academic Competitiveness Grant
  - 3.28 Federal Work Study
  - 3.29 No Interest Loan
  - 3.30 Direct Subsidized Loan
  - 3.31 Direct Unsubsidized Load
  - 3.32 PLUS
  - 3.33 Federal Perkins Loan
  - 3.34 Institutional Grants/Scholarships
  - 3.35 Institutional Loan
  - 3.36 TEACH Grant
  - 3.37 Iraq and Afghanistan Service Grant
  - 3.38 Federal Family Education Loan Subsidized
  - 3.39 Federal Family Education Loan Unsubsidized
  - 3.40 Other Institutional Aid
  - 3.41 Other Federal
  - 3.42 Other State
4. Click [Save].

The updated GEAR UP record displays, and student eligibility is re-determined.

# 6 Foster Child Grant Record

---

## 6.1 View Foster Child Grant Record

By entering a student SSN in the SSN Quick View on the main menu, a list of existing Foster Child Grant records are displayed by academic year.

To view a student's Foster Child Grant record, follow these steps:

1. From the Quick View menu, select the academic year link for the Foster Child Grant record you wish to view.
2. The Foster Child Grant record displays (*shown in 2 pieces*)

**Foster Child Grant  
Academic Year 2014 - 2015**

Status: **Eligible**

**PRINT LETTER**

**Student Information: SSN XXX-XX-9673**

Name	LOCKE,ABRIANA R
Address	20 MAIN STREET
City,State,Zip	MONSON,MA 01057
Home Phone Number	(222)222-2222
Email Address	email@email.com
Date Of Birth	08/21/1994
Gender	Female

**UPDATE STUDENT INFORMATION**

**ADD COMMENTS**

**Application Information**

Institution	002122-00, BAY PATH COLLEGE	FAFSA Original Application Date	02/01/2014
State of Legal Residence	MA	FAFSA Current Application Date	08/12/2014
Residence Date	08/01/2009	Dependency Status	Independent
Parent Sate Of Legal Residence		DCF Deadline Override	
Parent Residence Date		DCF Submit Date	09/04/2014
SSN Match	SSN, Name, and DOB match	1st BA Override	
SAR C Flag	C Flag Set	Grade Level	2nd Year/Sophomore
NSLDS Override		Bachelors Degree	No
NSLDS Match	Student Not in Default or Overpayment	Degree/Certificate	1st Bachelors Degree
Drug Override		Master/Doctorate	No
Drug Conviction	No	Award Letter Date	
Citizenship Override		Original Ineligible Letter Date	
SSA Citizenship	US Citizen	Current Ineligible Letter Date	

**UPDATE APPLICATION INFORMATION**



Financial Aid Information			
Cost of Attendance	21,150		
Tuition Only	14,400	Personal	4,550
Fees	0	Transportation	1,200
Room and Board	0	Child Care	0
Other Costs ()	0	Books and Supplies	1,000
Other Costs ()	0		
Estimated Family Contribution (EFC)	0	Fall Enrollment	Full-time
MASSGrant	1,700	Spring Enrollment	Full-time
Gilbert Grant	0	Scholar-Internship Match Fund	0
Cash Grant	0	Fee Waiver	0
Part-Time Grant	0	PELL Grant	5,730
GEAR UP Scholarship	0	Federal SEOG	0
Paraprofessional Teacher Preparation Grant	0	Federal Smart Grant	0
Public Service Grant	0	Academic Competitiveness Grant	0
Christian Herter Memorial Scholarship	0	Federal Work Study	0
Early Childhood Educators Scholarship	0	No Interest Loan	0
John and Abigail Adams Scholarship	0	Direct Subsidized Loan	4,500
Tuition Waiver	0	Direct Unsubsidized Loan	4,536
National Guard Tuition Waiver	0	PLUS	0
National Guard Tuition/Fee Assistance	0	Federal Perkins Loan	0
Massachusetts Educational Rewards Grant	0	Institutional Grants/Scholarships	0
Math & Science Teachers Scholarship	0	Institutional Loan	0
High Demand Scholarship	0	TEACH Grant	0
Completion Incentive Grant	0	Iraq and Afghanistan Service Grant	0
Internship Incentive Program Grant	0	Federal Family Education Loan Subsidized	0
Other Institutional Aid	0	Federal Family Education Loan Unsubsidized	0
Other Federal ()	0		
Other State ()	0		
Other Outside ()	0		
Other ()	0		

UPDATE FINANCIAL AID INFORMATION

Payment Information					
Term	Institution	Institution Type	EFC	Status	Amount
Fall	BAY PATH COLLEGE	Massachusetts Private 4-year		Paid	3000.00
Spring	BAY PATH COLLEGE	Massachusetts Private 4-year		ReadyToCertify	3000.00
				<b>Total</b>	<b>6000.00</b>

If a student is eligible for the Foster Child Grant program, “Eligible” status is displayed. If a student is not eligible for the Foster Child Grant program, “Ineligible” status is displayed along with one or more ineligible reasons.

### 6.1.1 Add Foster Child Grant Comment on Student

Users with, at minimum, “Update” security level for Foster Child Grant can enter comments for display in the student transaction history.

To enter a comment on a student, follow these steps:

1. From the Foster Child Grant Record screen, click [Add Comments]. The Add Comments screen displays.

Foster Child Grant Record  
Academic Year 2014 - 2015  
Add Comments

SAVE CANCEL

2. Enter your comment text.
3. Click [Save].

The comment will display on the student's transaction history screen.

### 6.1.2 Print Letter

Users can single-print a student's letter from the Foster Child Grant record.

To print a letter, follow these steps:

1. From the Foster Child Grant Record screen, click [Print Letter]. The Print Letter screen displays.

Print Letter  
JOHN SMITH  
XXX-XX-8825  
Academic Year: 2014-2015  
Letter Type: Award  
Letter Date:   
PRINT CANCEL

2. Enter a letter date.
3. Click [Print].

The student's letter will display as a .pdf document.

---

## 6.2 Update Foster Child Grant Record

Users with, at minimum, "Update" security level for Foster Child Grant can update Foster Child Grant records for the current or a future academic year. Records from previous academic years are not updateable.

When a Foster Child Grant record is updated, the MASSAid system re-determines eligibility for that student. This may affect the status of the student, including the award amounts for any unpaid terms.

## 6.2.1 Update Student Information

To update the Student Information on a Foster Child Grant record, follow these steps:

1. From the Foster Child Grant Record screen, click [Update Student Information].
2. The Update Student Information screen displays pre-filled with existing information.

Foster Child Grant Academic Year 2014 - 2015	
Update Student Information LOCKE, ABRIANA R, XXX-XX-9673	
<b>Last Name</b>	LOCKE
<b>First Name</b>	ABRIANA
Middle	R
<b>Address</b>	20 MAIN STREET
<b>City</b>	MONSON
<b>State</b>	MA <input type="button" value="v"/>
<b>Zip Code</b>	01057 <input type="text"/>
<b>Home Phone Number</b>	(222)222-2222
Email Address	email@email.com
<b>Date Of Birth</b>	08/21/1994
<b>Gender</b>	Female <input type="button" value="v"/>

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 **Last Name**
- 3.2 **First Name**
- 3.3 Middle Initial
- 3.4 **Address**
- 3.5 **City**
- 3.6 **State**
- 3.7 **Zip 5**
- 3.8 Zip 4
- 3.9 **Home Phone Number**
- 3.10 Email Address
- 3.11 **Date of Birth**
- 3.12 Gender

4. Click [Save].

The updated Foster Child Grant record displays, and student eligibility is re-determined.

## 6.2.2 Update Application Information

To update the Application Information on a Foster Child Grant record, follow these steps:

1. From the Foster Child Grant Record screen, click [Update Application Information].
2. The Update Application Information screen displays pre-filled with existing information.

Update Application Information LOCKE,ABRIANA R, XXX-XX-9673			
State of Legal Residence	MA	DCF Deadline Override	<input type="checkbox"/>
Residence Date	08/01/2009	Citizenship Override	<input type="checkbox"/>
Parent Sate Of Legal Residence		NSLDS Override	<input type="checkbox"/>
Parent Residence Date		Drug Override	<input type="checkbox"/>
SSN Match	SSN, Name, and DOB match	1st BA Override	<input type="checkbox"/>
Master/Doctorate	No <input type="checkbox"/>	Bachelors Degree	No <input type="checkbox"/>
Degree/Certificate	1st Bachelors Degree <input type="checkbox"/>	Grade Level	2nd Year/Sophomore <input type="checkbox"/>

**SAVE**      **CANCEL**

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 **Masters/Doctorate**
- 3.2 **Degree/Certificate**
- 3.3 DCF Deadline Override (checkbox)
- 3.4 Citizenship Override (checkbox)
- 3.5 NSLDS Override (checkbox)
- 3.6 Drug Override (checkbox)
- 3.7 1<sup>st</sup> BA Override (checkbox)
- 3.8 **Bachelors Degree**
- 3.9 **Grade Level**

The updated Foster Child Grant record displays, and student eligibility is re-determined.

---

*Note: Selecting any "override" checkbox will ignore the associated ineligible reason for the student for the academic year.*

---

## 6.2.3 Update Financial Aid Information

To update the Financial Aid Information on a Foster Child Grant record, follow these steps:

1. From the Foster Child Grant Record screen, click [Update Financial Aid Information].
2. The Update Financial Aid Information screen displays pre-filled with existing information.

**Update Financial Information**  
**ASHLEY SMITH, XXX-XX-3206**  
**BUNKER HILL COMMUNITY COLLEGE**

Fall Enrollment

Not Enrolled

Spring Enrollment

Full-time

<b>Cost of Attendance</b>	<input type="text" value="7992"/>		
<b>Estimated Family Contribution (EFC)</b>	<input type="text" value="0"/>		
MASSGrant	<input type="text" value="0"/>	Scholar-Internship Match Fund	<input type="text" value="0"/>
Gilbert Grant	<input type="text" value="0"/>	Fee Waiver	<input type="text" value="0"/>
Cash Grant	<input type="text" value="0"/>	PELL Grant	<input type="text" value="2865"/>
Part-Time Grant	<input type="text" value="0"/>	Federal SEOG	<input type="text" value="0"/>
Foster Child Grant	<input type="text" value="0"/>	Federal Smart Grant	<input type="text" value="0"/>
Paraprofessional Teacher Preparation Grant	<input type="text" value="0"/>	Academic Competitiveness Grant	<input type="text" value="0"/>
Public Service Grant	<input type="text" value="0"/>	Federal Work Study	<input type="text" value="0"/>
Christian Herter Memorial Scholarship	<input type="text" value="0"/>	No Interest Loan	<input type="text" value="0"/>
Early Childhood Educators Scholarship	<input type="text" value="0"/>	Direct Subsidized Loan	<input type="text" value="0"/>
John and Abigail Adams Scholarship	<input type="text" value="0"/>	Direct Unsubsidized Loan	<input type="text" value="0"/>
Tuition Waiver	<input type="text" value="0"/>	PLUS	<input type="text" value="0"/>
National Guard Tuition Waiver	<input type="text" value="0"/>	Federal Perkins Loan	<input type="text" value="0"/>
National Guard Tuition/Fee Assistance	<input type="text" value="0"/>	Institutional Grants/Scholarships	<input type="text" value="0"/>
Massachusetts Educational Rewards Grants	<input type="text" value="0"/>	Institutional Loan	<input type="text" value="0"/>
Math & Science Teachers Scholarship	<input type="text" value="0"/>	TEACH Grant	<input type="text" value="0"/>
High Demand Scholarship	<input type="text" value="0"/>	Iraq and Afghanistan Service Grant	<input type="text" value="0"/>
Completion Incentive Grant	<input type="text" value="0"/>	Federal Family Education Loan Subsidized	<input type="text" value="0"/>
Internship Incentive Program Grant	<input type="text" value="0"/>	Federal Family Education Loan Unsubsidized	<input type="text" value="0"/>
Other Institutional Aid	<input type="text" value="0"/>		
Other Federal (Please Specify)	<input type="text" value="0"/>		
Other State (Please Specify)	<input type="text" value="0"/>		
Other Outside (Please Specify)	<input type="text" value="0"/>		
Other (Please Specify)	<input type="text" value="0"/>		

**SAVE**

**CANCEL**

3. Edit one or more of the following fields (fields in **bold** are required):

3.1 **Fall Enrollment**

- 3.1.1 Full-time
- 3.1.2  $\frac{3}{4}$  time
- 3.1.3 Half-time
- 3.1.4 Less Than Half-time
- 3.1.5 Not Enrolled

3.2 **Spring Enrollment**

- 3.2.1 Full-time
- 3.2.2  $\frac{3}{4}$  time
- 3.2.3 Half-time
- 3.2.4 Less Than Half-time
- 3.2.5 Not Enrolled

3.3 **Cost of Attendance**

3.4 **Estimated Family Contribution (EFC)**

---

*Note: If a student's EFC value is updated, the user will be redirected to the EFC Change screen to enter the supporting EFC Change data.*

---

- 3.5 MASSGrant (this field is **required** if the EFC meets the Pell/MASSGrant EFC cutoff on the Foster Child Grant Award Rules)
- 3.6 Gilbert Grant
- 3.7 Cash Grant
- 3.8 Part-Time Grant
- 3.9 Foster Child Grant
- 3.10 Teacher Preparation Grant
- 3.11 Public Service Grant
- 3.12 Christian Herter Memorial Scholarship
- 3.13 Early Childhood Educators Scholarship
- 3.14 John and Abigail Adams Scholarship
- 3.15 Tuition Waiver
- 3.16 National Guard Tuition Waiver
- 3.17 National Guard Tuition/Fee Assistance
- 3.18 Massachusetts Educational Rewards Grant
- 3.19 Math & Science Teachers Scholarship
- 3.20 High Demand Scholarship
- 3.21 Completion Incentive Grant

- 3.22 Scholar-Internship Match Fund
  - 3.23 GEAR UP Scholarship (display only field; not updateable)
  - 3.24 PELL Grant (this field is **required** if the EFC meets the Pell/MASSGrant EFC cutoff on the Foster Child Grant Award Rules)
  - 3.25 Federal SEOG
  - 3.26 Federal Smart Grant
  - 3.27 Academic Competitiveness Grant
  - 3.28 Federal Work Study
  - 3.29 No Interest Loan
  - 3.30 Direct Subsidized Loan
  - 3.31 Direct Unsubsidized Load
  - 3.32 PLUS
  - 3.33 Federal Perkins Loan
  - 3.34 Institutional Grants/Scholarships
  - 3.35 Institutional Loan
  - 3.36 TEACH Grant
  - 3.37 Iraq and Afghanistan Service Grant
  - 3.38 Federal Family Education Loan Subsidized
  - 3.39 Federal Family Education Loan Unsubsidized
  - 3.40 Other Institutional Aid
  - 3.41 Other Federal
  - 3.42 Other State
4. Click [Save].

The updated Foster Child Grant record displays, and student eligibility is re-determined.

# 7 DCF Fee Assistance Record

## 7.1 View DCF Fee Assistance Record

By entering a student SSN in the SSN Quick View on the main menu, a list of existing DCF Fee Assistance records are displayed by academic year.

To view a student's DCF Fee Assistance record, follow these steps:

1. From the Quick View menu, select the academic year link for the DCF Fee Assistance record you wish to view.
2. The DCF Fee Assistance record displays (*shown in 2 pieces*)

**DCF Adopted and Foster Child Fee Assistance**  
**Academic Year 2014 - 2015**

Status: Eligible

PRINT LETTER

**Student Information: SSN XXX-XX-2964**

Name	SULLIVAN,MICH D
Address	10 MAIN STREET
City,State,Zip	PEMBROKE,MA 02359
Home Phone Number	(222)222-2222
Email Address	email@email.com
Date Of Birth	12/26/1992
Gender	Female

UPDATE STUDENT INFORMATION
ADD COMMENTS

**Application Information**

Institution	002183-00, BRIDGEWATER STATE UNIVERSITY	Application Date	12/18/2014
Title IV Eligible		Application Date Override	
Dependency Status	Dependent	1st BA Override	
SSN Match	SSN, Name, and DOB match	Grade Level	3rd Year/Junior
SAR C Flag	No Flag Set	Bachelors Degree	No
NSLDS Override		Degree/Certificate	Certificate/Diploma-At Least 2 Years
NSLDS Match	Student Not in Default or Overpayment	Master/Doctorate	No
Drug Override		Award Letter Date	01/07/2015
Drug Conviction	No	Original Ineligible Letter Date	
Citizenship Override		Current Ineligible Letter Date	
SSA Citizenship	US Citizen	FAFSA on File (non-MA residents)	
Eligibility Documentation on File	Yes		

UPDATE APPLICATION INFORMATION



Financial Information			
EFC	0	Fee Assistance Type	Foster Child
Parent Adjusted Gross Income	31,161	Family Size	
FALL DATA:		SPRING DATA:	
Fall Enrollment	Full-time	Spring Enrollment	Full-time
Number of State Supported Fall Credits	12	Number of State Supported Spring Credits	
Number of Non-State Supported Fall Credits	3	Number of Non-State Supported Spring Credits	
Total Fall Fees Waived(State Supported Only)	8,000	Total Spring Fees Waived(State Supported Only)	
Additional funds requested for fall		Additional funds requested for spring	

UPDATE FINANCIAL INFORMATION

Payment Information					
Term	Institution	Institution Type	EFC	Status	Amount
Fall	BRIDGEWATER STATE UNIVERSITY	Massachusetts State College		Paid	8000.00
				Total	8000.00

If a student is eligible for the DCF Fee Assistance program, “Eligible” status is displayed. If a student is not eligible for the DCF Fee Assistance program, “Ineligible” status is displayed along with one or more ineligible reasons.

### 7.1.1 Add DCF Fee Assistance Comment on Student

Users with, at minimum, “Update” security level for DCF Fee Assistance can enter comments for display in the student transaction history.

To enter a comment on a student, follow these steps:

1. From the DCF Fee Assistance Record screen, click [Add Comments]. The Add Comments screen displays.

**DCF Adopted and Foster Child Fee Assistance Record**  
Academic Year 2014 - 2015

**Add Comments**

SAVE
CANCEL

2. Enter your comment text.
3. Click [Save].

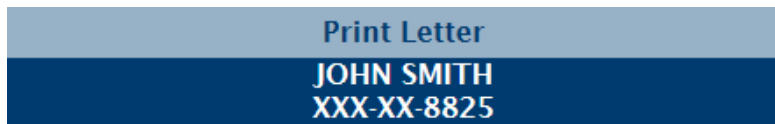
The comment will display on the student’s transaction history screen.

### 7.1.2 Print Letter

Agency users can single-print a student’s letter from the DCF Fee Assistance record.

To print a letter, follow these steps:

1. From the DCF Fee Assistance Record screen, click [Print Letter]. The Print Letter screen displays.



Academic Year: 2014-2015

Letter Type: Award

Letter Date:

PRINT

CANCEL

2. Enter a letter date.
3. Click [Print].

The student's award letter will display as a .pdf document.

---

## 7.2 Update DCF Fee Assistance Record

Users with, at minimum, "Update" security level for DCF Fee Assistance can update DCF Fee Assistance records for the current or a future academic year. Records from previous academic years are not updateable.

When a DCF Fee Assistance record is updated, the MASSAid system re-determines eligibility for that student. This may affect the status of the student, including the award amounts for any unpaid terms.

### 7.2.1 Update Student Information

To update the Student Information on a DCF Fee Assistance record, follow these steps:

1. From the DCF Fee Assistance Record screen, click [Update Student Information].
2. The Update Student Information screen displays pre-filled with existing information.

DCF Adopted and Foster Child Fee Assistance Academic Year 2014 - 2015	
Update Student Information SULLIVAN,MICH D, XXX-XX-2964	
<b>Last Name</b>	SULLIVAN
<b>First Name</b>	MICH
<b>Middle</b>	D
<b>Address</b>	10 MAIN STREET
<b>City</b>	PEMBROKE
<b>State</b>	MA <input type="button" value="v"/>
<b>Zip Code</b>	02359 <input type="text"/>
<b>Home Phone Number</b>	(222)222-2222
<b>Email Address</b>	email@email.com
<b>Date Of Birth</b>	12/26/1992
<b>Gender</b>	Female <input type="button" value="v"/>

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 **Last Name**
- 3.2 **First Name**
- 3.3 Middle Initial
- 3.4 **Address**
- 3.5 **City**
- 3.6 **State**
- 3.7 **Zip 5**
- 3.8 Zip 4
- 3.9 **Home Phone Number**
- 3.10 Email Address
- 3.11 **Date of Birth**
- 3.12 Gender

4. Click [Save].

The updated DCF Fee Assistance record displays, and student eligibility is re-determined.

## 7.2.2 Update Application Information

To update the Application Information on a DCF Fee Assistance record, follow these steps:

1. From the DCF Fee Assistance Record screen, click [Update Application Information].
2. The Update Application Information screen displays pre-filled with existing information.

Update Application Information SULLIVAN,MICH D, XXX-XX-2964	
Title IV Eligible	<input type="checkbox"/>
Dependency Status	Dependent <input type="checkbox"/>
SSN Match	SSN, Name, and DOB match <input type="checkbox"/>
NSLDS Override	<input type="checkbox"/>
Drug Override	<input type="checkbox"/>
Citizenship Override	<input type="checkbox"/>
Eligibility Documentation on File	Yes <input type="checkbox"/>
1st BA Override	<input type="checkbox"/>
Grade Level	3rd Year/Junior <input type="checkbox"/>
Bachelors Degree	No <input type="checkbox"/>
Degree/Certificate	Certificate/Diploma-At Least 2 Years <input type="checkbox"/>
Master/Doctorate	No <input type="checkbox"/>
Application Date Override	<input type="checkbox"/>

3. Edit one or more of the following fields (fields in **bold** are required):

- 3.1 Title IV Eligible
- 3.2 Dependency Status
- 3.3 SSN Match Flag
- 3.4 NSLDS Override (checkbox)
- 3.5 Drug Override (checkbox)
- 3.6 Citizenship Override (checkbox)
- 3.7 1<sup>st</sup> BA Override (checkbox)
- 3.8 Grade Level
- 3.9 Bachelors Degree
- 3.10 Degree/Certificate
- 3.11 Masters/Doctorate

The updated DCF Fee Assistance record displays, and student eligibility is re-determined.

---

*Note: Selecting any "override" checkbox will ignore the associated ineligible reason for the student for the academic year.*

---

### 7.2.3 Update Financial Aid Information

To update the Financial Aid Information on a DCF Fee Assistance record, follow these steps:

1. From the DCF Fee Assistance Record screen, click [Update Financial Aid Information].
2. The Update Financial Aid Information screen displays pre-filled with existing information.

DCF Adopted and Foster Child Fee Assistance Academic Year 2014 - 2015	
Update Financial Information SULLIVAN, MICH D, XXX-XX-2964	
<b>Fee Assistance Type</b>	Foster Child <input type="button" value="v"/>
Estimated Family Contribution (EFC)	0
Family Size	
Parent Adjust Gross Income	31161
FALL DATA:	
Fall Enrollment	Full-time
<b>Number of State Supported Fall Credits</b>	<input type="text" value="12"/>
<b>Number of Non-State Supported Fall Credits</b>	<input type="text" value="3"/>
<b>Total Fall Fees Waived (State Supported Only)</b>	<input type="text" value="8000"/> <input type="button" value="REQUEST ADDITIONAL DISBURSEMENT"/>
SPRING DATA:	
Spring Enrollment	Full-time
<b>Number of State Supported Spring Credits</b>	<input type="text"/>
<b>Number of Non-State Supported Spring Credits</b>	<input type="text"/>
<b>Total Spring Fees Waived (State Supported Only)</b>	<input type="text"/>
<input type="button" value="SAVE"/> <input type="button" value="CANCEL"/>	

---

*Note: Only non-paid terms are available for update.*

---

3. Edit one or more of the following fields (fields in **bold** are required):
  - 3.1 **Fee Assistance Type**
  - 3.2 **Number of State Supported Term Credits**
  - 3.3 **Number on Non-State Supported Term Credits**
  - 3.4 **Total Term Fees Waived (State Supported Only)**
4. Click [Save].

The updated DCF Fee Assistance record displays, and student eligibility is re-determined.

### 7.2.3.1 Request Additional Disbursement

To request an additional disbursement for a term that has already been paid, follow these steps:

1. From the Update Financial Information screen, click [Request Additional Disbursement].

---

*Note: The [Request Additional Disbursement] button only displays for 'Paid' terms.*

---

2. The Request Additional Disbursement screen is displayed.

Request Additional Disbursement  
DCF Adopted and Foster Child Fee Assistance  
Fall 2014 - 2015

SULLIVAN,MICH D, XXX-XX-2964

Additional State Supported  
Credits

Additional Amount Requested

SAVE

CANCEL

3. Enter the following:
  - 3.1 Additional State Supported Credits
  - 3.2 Additional Amount Requested
4. Click [Save].

The request for additional funds will be forwarded to OSFA; the request must be approved.

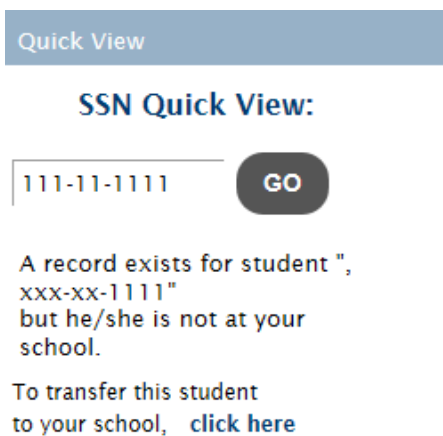
# 8 Transfer Student to User's School

## 8.1 Transfer Student

When a student SSN is entered in the Quick View menu and the student has not attended the user's school, the school user has the opportunity to transfer the student to their school.

To transfer a student to your school, follow these steps:

1. Enter the SSN of the student who is not attending your school in the Quick View menu.
2. The 'transfer student' message will display.



Quick View

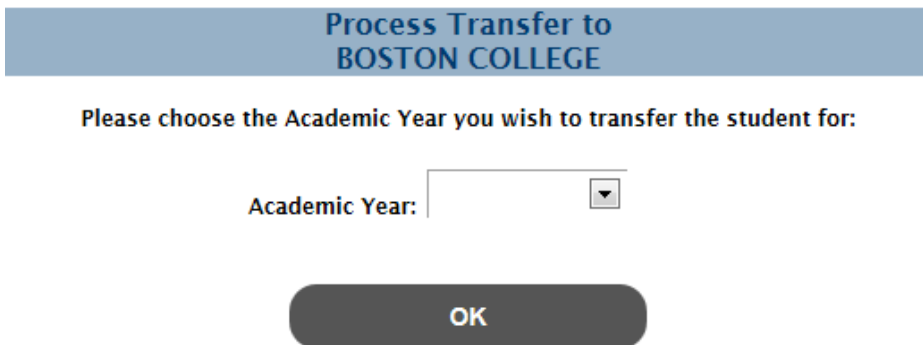
**SSN Quick View:**

111-11-1111 **GO**

A record exists for student "  
xxx-xx-1111"  
but he/she is not at your  
school.

To transfer this student  
to your school, [click here](#)

3. Select 'click here.' The Choose an Academic Year screen is displayed.



**Process Transfer to  
BOSTON COLLEGE**

Please choose the Academic Year you wish to transfer the student for:

Academic Year:  ▼

**OK**

4. Select an academic year. The Select Transfer Term screen is displayed.

**Process Transfer to  
BOSTON COLLEGE**

Please verify you wish to transfer the following student to your institution:

**JOHN SMITH, 888-88-8825**  
**DOB: 11/11/1994**  
**Currently at: STONEHILL COLLEGE**

Transfer Term:

*Only non-Paid terms are available for transfer.*

*The transfer will be initiated from the Transfer Term selected and forward. If Transfer Term 'Fall' is selected, the transfer will be processed for the Fall, Spring, Summer 1 and Summer 2 terms (provided neither term has already been paid by another institution). If Transfer Term 'Spring' is selected, the transfer will be processed for the Spring term (provided none of terms have not been paid by another institution).*

**PROCESS TRANSFER**

**CANCEL**

5. Select a transfer term.

---

*Note: The transfer will be initiated from the Transfer Term selected and forward. If transfer term 'Fall' is selected, the transfer will be processed for the Fall and Spring terms (provided neither term has already been paid by another institution). If transfer term 'Spring' is selected, the transfer will be processed for the Spring term (provided the Spring term has not been paid by another institution).*

---

6. Click [Process Transfer].

The student will be transferred and the Quick View menu will be populated for the student.



# 9 Student Transaction History

## 9.1 View Student Transaction History

The student transaction history displays updates made to all aid program records chronologically by academic year. In addition, comments are displayed in chronological order among the transactions.

To view a student transaction history, follow these steps:

1. From the Quick View menu for a student, select Transaction History.
2. The Student Transaction History screen is displayed.

Student Transaction History							
JOHN SMITH, XXX-XX-6666							
Filter: <input type="text"/>							
Date	Program	Field	Old Value	New Value	Source	User Type	User
5/23/2011	MASSGrant	EmailAddress	SMITH@EMAIL.COM	JSMITH@EMAIL.COM	Update MASS Grant Record	Agency	rgrahamMASS500
5/23/2011	MASSGrant	MailingAddress	40 TOWER ST.	11 MAIN STREET	Update MASS Grant Record	Agency	rgrahamMASS500
5/19/2011	MASSGrant	OweRefundStatus	Owe Refund	No Refund Owed	Update	Agency	rgrahamMASS500
5/13/2011	MASSGrant	FirstName	JESSE	JOHN	ISIR	Agency	rgrahamMASS500
ACYear 2011 - 2012							
Date	Program	Field	Old Value	New Value	Source	User Type	User
5/23/2011	MASSGrant	EligibilityStatus		Ineligible	Eligibility		ALB-329310L
5/19/2011	MASSGrant	COMMENT:	Financial Information updated for reason - No Interest Loan Application not Accepted		Comment	Agency	rgrahamMASS500
5/19/2011	MASSGrant	InvestmentNetWorth	0.00	10.00	ISIR	Agency	rgrahamMASS500

Users can filter by comments only or by field by selecting a filter option.

# 10 Student Payment History

## 10.1 View Student Payment History

The student payment history displays paid payments the agency has disbursed to the student for all aid programs, chronologically by academic year. In addition, any paid adjustments to payment records display chronologically.

To view a student's payment history, follow these steps:

1. From the Quick View menu for a student, select Payment History.
2. The Student Payment History screen is displayed.

Student Payment History XXX-XX-8825							
Student Information							
Name	JOHN SMITH						
Address	100 MAIN STREET						
City,State,Zip	MEDFORD, MA 02155						
Home Phone Number	(111)111-1111						
Date of Birth	11/11/1994						
Email Address	smith@email.email						
Gender	Male						
License State and Number	MA - 111111111						
MASSAid ID	1652738						
Academic Year 2014 - 2015							
Date	Batch Number	Program	Institution	Term	Reconciled	Type	Amount
2014/10/30	B0120601	NIL-P006691	STONEHILL COLLEGE	Fall		Payment	\$2000.00
2014/10/09	B0120445	MASSGrant	STONEHILL COLLEGE	Fall	Y	Payment	\$200.00
Academic Year 2013 - 2014							
Date	Batch Number	Program	Institution	Term	Reconciled	Type	Amount
2014/03/27	B0113667	MASSGrant	STONEHILL COLLEGE	Spring	Y	Payment	\$800.00
2014/01/23	B0107029	NIL-P004282	STONEHILL COLLEGE	Spring		Payment	\$2000.00
2013/10/31	B0106587	NIL-P004282	STONEHILL COLLEGE	Fall		Payment	\$2000.00
2013/10/10	B0106497	MASSGrant	STONEHILL COLLEGE	Fall	Y	Payment	\$800.00
Academic Year 2012 - 2013							
Date	Batch Number	Program	Institution	Term	Reconciled	Type	Amount
2013/02/07	B0105181	NIL-P001077	STONEHILL COLLEGE	Spring		Payment	\$2000.00
2013/02/07	B0105179	MASSGrant	STONEHILL COLLEGE	Spring	Y	Payment	\$350.00
2013/01/03	B0105065	NIL-P001077	STONEHILL COLLEGE	Fall		Payment	\$2000.00
2012/10/31	B0104570	MASSGrant	STONEHILL COLLEGE	Fall	Y	Payment	\$350.00

