**MASSAid School User Guide**

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1 System Requirements

1.1 Operating Systems

MASSAid runs on the following operating systems:

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

1.2 Hardware and Software

MASSAid has the following hardware and software requirements:

<table>
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<th>Equipment</th>
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<tr>
<td>PC</td>
<td>133 MHz or faster Pentium</td>
</tr>
<tr>
<td>RAM</td>
<td>32 MB or higher</td>
</tr>
<tr>
<td>Disk drive</td>
<td>50 MB or higher</td>
</tr>
<tr>
<td>Internet access</td>
<td>Connection to the Internet</td>
</tr>
<tr>
<td>Browser</td>
<td>Internet Explorer 8.0 or higher</td>
</tr>
<tr>
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<td>JavaScripting must be enabled</td>
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<td>Cookies must be enabled</td>
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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.

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.
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.
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.

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.

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

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.

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
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)
  o Early Childhood Educators Scholarship
  o Paraprofessional Teacher Preparation Grant
  o GEAR UP Scholarship
  o Foster Child Grant
  o 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 is 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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Student SSN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>First Name</td>
</tr>
<tr>
<td>SSN First 5</td>
<td>SSN Last 4</td>
</tr>
</tbody>
</table>

### Additional Search Criteria

- **Academic Year**
- **Aid Program**

**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 Email Screen]

   - **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.*

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.
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.
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.

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].

The MASSGrant payment table is displayed.
2. The MASSGrant Payment Table screen is displayed.

<table>
<thead>
<tr>
<th>Award Amounts</th>
<th>Private</th>
<th>Public University</th>
<th>Public State College</th>
<th>Public Community</th>
<th>Proprietary</th>
<th>Voc/Tech</th>
<th>Nursing</th>
<th>Out-of-State</th>
</tr>
</thead>
<tbody>
<tr>
<td>EFC 0-200</td>
<td>1700</td>
<td>1500</td>
<td>1100</td>
<td>900</td>
<td>600</td>
<td>500</td>
<td>800</td>
<td>300</td>
</tr>
<tr>
<td>EFC 201-500</td>
<td>800</td>
<td>600</td>
<td>600</td>
<td>600</td>
<td>600</td>
<td>400</td>
<td>600</td>
<td>300</td>
</tr>
<tr>
<td>EFC 501-1000</td>
<td>700</td>
<td>500</td>
<td>500</td>
<td>500</td>
<td>500</td>
<td>400</td>
<td>500</td>
<td>300</td>
</tr>
<tr>
<td>EFC 1001-1500</td>
<td>600</td>
<td>500</td>
<td>500</td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>300</td>
</tr>
<tr>
<td>EFC 1501-2000</td>
<td>500</td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>300</td>
</tr>
<tr>
<td>EFC 2001-5157</td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>300</td>
</tr>
<tr>
<td>EFC 5158-999999</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

*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.
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].
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.
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.

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.
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](CumulativeInformationRoster.png)

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](DownloadInformationRoster.png)

2. Select an academic year and term and click [Download Information Roster].
3. The Verity Criteria screen displays. Verify that the year, program and term have been selected and click [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.

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 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](image)

   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.
**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.
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.

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

![Verify Criteria](image)

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.

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](image)

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.

![File Requests](image)

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 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].
4. The Upload Certification Roster screen is displayed.

5. Click [Browse] and browse to the certification 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.

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

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.
9. 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.

<table>
<thead>
<tr>
<th>SSN</th>
<th>Name</th>
<th>Address</th>
<th>Citizenship Eligible</th>
</tr>
</thead>
<tbody>
<tr>
<td>088-88-8888</td>
<td>TAN BID</td>
<td>11 BEDFORD ST,LEXINGTON MA</td>
<td></td>
</tr>
<tr>
<td>078-78-7878</td>
<td>OLAB BOLA</td>
<td>72 BRAYTON AVENUE,FALL RIVER MA</td>
<td></td>
</tr>
<tr>
<td>090-90-9090</td>
<td>OLCE CEVEDO</td>
<td>8 WALES ST.,DORCHESTER MA</td>
<td></td>
</tr>
<tr>
<td>028-28-2828</td>
<td>RICH EAMPONG</td>
<td>4 OAK AVENUE,TYNGBORO MA</td>
<td></td>
</tr>
</tbody>
</table>

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.

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.*
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

<table>
<thead>
<tr>
<th>SSN</th>
<th>Name</th>
<th>Institution</th>
<th>Date Entered</th>
<th>Refund Amount Owed</th>
<th>Refund Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>022-22-2222</td>
<td>JESSICA CABRA</td>
<td>BRISTOL COMMUNITY COLLEGE</td>
<td>4/30/2004</td>
<td>$72.00</td>
<td>Owe Refund</td>
</tr>
<tr>
<td>177-77-7777</td>
<td>Jaquai Abreu</td>
<td>BRISTOL COMMUNITY COLLEGE</td>
<td>2/20/2013</td>
<td>$0.00</td>
<td>No Refund Owed</td>
</tr>
</tbody>
</table>

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.
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.

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:**

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>2014 to 2015</th>
</tr>
</thead>
</table>

| 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

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Eric Newnum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Title</td>
<td>Assistant Director for Loans</td>
</tr>
<tr>
<td>Contact Email Address</td>
<td><a href="mailto:RGrAham@nelnet.net">RGrAham@nelnet.net</a></td>
</tr>
<tr>
<td>Phone Number</td>
<td>508-565-1076</td>
</tr>
<tr>
<td>Fax Number</td>
<td>508-565-1426</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Secondary Contact Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary Contact Title</td>
<td></td>
</tr>
<tr>
<td>Secondary Contact Email Address</td>
<td></td>
</tr>
<tr>
<td>Secondary Phone Number</td>
<td></td>
</tr>
<tr>
<td>Secondary Fax Number</td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td>Yes</td>
</tr>
<tr>
<td>Allocation</td>
<td>700000</td>
</tr>
<tr>
<td>De-obligated</td>
<td></td>
</tr>
</tbody>
</table>

### Promissory Note Components

<table>
<thead>
<tr>
<th>Loan Period Begin Date</th>
<th>08/27/2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan Period End Date</td>
<td>05/08/2015</td>
</tr>
<tr>
<td>Disbursement Preference</td>
<td>Fall, Spring</td>
</tr>
<tr>
<td>Fall Disbursement Date</td>
<td>09/15/2014</td>
</tr>
<tr>
<td>Spring Disbursement Date</td>
<td>01/23/2015</td>
</tr>
<tr>
<td>Summer Disbursement Date</td>
<td></td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Date</th>
<th>Program</th>
<th>Term</th>
<th>Type</th>
<th>Batch Number</th>
<th>Reconciled</th>
<th>Number Of Students</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/13/2014</td>
<td>NIL</td>
<td>Fall</td>
<td>Payment</td>
<td>80120756</td>
<td>Y</td>
<td>5</td>
<td>$9,000.00</td>
</tr>
<tr>
<td>10/30/2014</td>
<td>NIL</td>
<td>Fall</td>
<td>Payment</td>
<td>80120801</td>
<td>Y</td>
<td>180</td>
<td>$270,050.00</td>
</tr>
</tbody>
</table>

Total: $279,050.00

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.

<table>
<thead>
<tr>
<th>Name</th>
<th>SSN</th>
<th>Payment Type</th>
<th>Term</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. BOUD, ZACHARY</td>
<td>025-00-0000</td>
<td>Payment</td>
<td>Fall</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>2. GATES, RONDE</td>
<td>032-00-0000</td>
<td>Payment</td>
<td>Fall</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>3. SAWYER, DOROTHY</td>
<td>022-00-0000</td>
<td>Payment</td>
<td>Fall</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>4. TORREA, CHRISTAL</td>
<td>013-00-0000</td>
<td>Payment</td>
<td>Fall</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>5. WOOV, THOMAS</td>
<td>027-00-0000</td>
<td>Payment</td>
<td>Fall</td>
<td>$1,000.00</td>
</tr>
</tbody>
</table>

Total: $9,000.00
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](image)

<table>
<thead>
<tr>
<th>SSN</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>022-23-3333</td>
<td>YAMROT ABER</td>
</tr>
<tr>
<td>021-11-1111</td>
<td>JULIANA L. ABRAN</td>
</tr>
<tr>
<td>034-33-3333</td>
<td>AMANDA J. ADAM</td>
</tr>
<tr>
<td>011-11-1111</td>
<td>TAMRA J. ADAM</td>
</tr>
<tr>
<td>021-33-3333</td>
<td>TIMOTHY ADAM</td>
</tr>
<tr>
<td>011-11-1111</td>
<td>MELISSA M. ADREA</td>
</tr>
<tr>
<td>016-33-3333</td>
<td>DAVID A. AFFU</td>
</tr>
<tr>
<td>011-11-1111</td>
<td>JAMES ACBA</td>
</tr>
<tr>
<td>022-33-3333</td>
<td>CHINEYE AGON</td>
</tr>
<tr>
<td>411-11-1111</td>
<td>SAMIN AKARI</td>
</tr>
<tr>
<td>034-33-3333</td>
<td>KAITLYN L. AKER</td>
</tr>
<tr>
<td>011-11-1111</td>
<td>MARY M. ALDRI</td>
</tr>
<tr>
<td>581-33-3333</td>
<td>JANET ALFAR</td>
</tr>
<tr>
<td>025-78-5590</td>
<td>BRAYLIN M. ALL</td>
</tr>
<tr>
<td>020-33-3333</td>
<td>JEREMY ALLEY</td>
</tr>
</tbody>
</table>
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.

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.

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.

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.

<table>
<thead>
<tr>
<th>Major</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child Development</td>
<td>Yes</td>
</tr>
<tr>
<td>Child Guidance</td>
<td>Yes</td>
</tr>
<tr>
<td>Child Psychology</td>
<td>Yes</td>
</tr>
<tr>
<td>Early Childhood Education</td>
<td>Yes</td>
</tr>
<tr>
<td>Elementary Education</td>
<td>Yes</td>
</tr>
<tr>
<td>Human Services</td>
<td>Yes</td>
</tr>
<tr>
<td>Interdisciplinary Studies</td>
<td>Yes</td>
</tr>
<tr>
<td>Physical Education</td>
<td>Yes</td>
</tr>
<tr>
<td>Psychology</td>
<td>Yes</td>
</tr>
<tr>
<td>Recreation</td>
<td>Yes</td>
</tr>
<tr>
<td>Social Work</td>
<td>Yes</td>
</tr>
<tr>
<td>Sociology</td>
<td>Yes</td>
</tr>
<tr>
<td>The Arts</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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.
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].

<table>
<thead>
<tr>
<th>Award Amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Amount Per Credit</strong></td>
</tr>
<tr>
<td>Community College</td>
</tr>
<tr>
<td>Private 2-Year</td>
</tr>
<tr>
<td>Private 2-Year Special</td>
</tr>
<tr>
<td>Private 4-Year</td>
</tr>
<tr>
<td>Private 5-Year</td>
</tr>
<tr>
<td>State College</td>
</tr>
<tr>
<td>State University</td>
</tr>
</tbody>
</table>

RETURN TO AWARD RULES
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.
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.
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.

**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](image)

   ![Certification Roster](image)

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.
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.
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.

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.

<table>
<thead>
<tr>
<th>Major</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biology</td>
<td>Yes</td>
</tr>
<tr>
<td>Bridge to Teaching</td>
<td>Yes</td>
</tr>
<tr>
<td>Business</td>
<td>Yes</td>
</tr>
<tr>
<td>Visual Art</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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.
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**

<table>
<thead>
<tr>
<th>Change Academic Year</th>
<th>2014 to 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>School OECODE</strong></td>
<td>002128</td>
</tr>
<tr>
<td><strong>School Branch</strong></td>
<td>00</td>
</tr>
<tr>
<td><strong>Vendor ID</strong></td>
<td>VC6000156860</td>
</tr>
<tr>
<td><strong>Tax Identification Number (TIN)</strong></td>
<td>42103545</td>
</tr>
<tr>
<td><strong>School Name</strong></td>
<td>BOSTON COLLEGE</td>
</tr>
<tr>
<td><strong>Address</strong></td>
<td>LYONS HALL,</td>
</tr>
<tr>
<td><strong>Address 2</strong></td>
<td>STUDENT SER, 140 COMMONWEALTH AVENUE</td>
</tr>
<tr>
<td><strong>City</strong></td>
<td>CHESTNUT HILL</td>
</tr>
<tr>
<td><strong>State</strong></td>
<td>Massachusetts</td>
</tr>
<tr>
<td><strong>Zip Code</strong></td>
<td>02167 - 0000</td>
</tr>
<tr>
<td><strong>Phone Number</strong></td>
<td>333-333-3333</td>
</tr>
<tr>
<td><strong>Fax Number</strong></td>
<td>444-444-4444</td>
</tr>
<tr>
<td><strong>School Type</strong></td>
<td>Massachusetts Private 4-year</td>
</tr>
</tbody>
</table>

### 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** | No |
| **Secondary Contact Title** | No |
| **Secondary Contact Email Address** | No |
| **Secondary Phone Number** | No |
| **Secondary Fax Number** | No |
| **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].

   \textit{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 \textbf{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.
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.

### 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 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](image)

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.
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.

![Award Rules Screen]

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.
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].

<table>
<thead>
<tr>
<th>Award Amounts</th>
<th>Fall</th>
<th>Spring</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-Time</td>
<td>500</td>
<td>500</td>
<td>1000</td>
</tr>
<tr>
<td>Three-Quarter Time</td>
<td>450</td>
<td>450</td>
<td>900</td>
</tr>
<tr>
<td>Half-Time or Less</td>
<td>400</td>
<td>400</td>
<td>800</td>
</tr>
</tbody>
</table>

RETURN TO AWARD RULES
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.
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.
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.

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 Screen]

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.

   ![Select Academic Term]

   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.

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

   ![Certification Roster]

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

2. Select a student and the Submit Financial Data screen is displayed for the selected student.
### 3. Enter/edit one or more of the following (required fields are in **bold**):

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

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.

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**

**Academic Year**

2014 to 2015

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Ocode</td>
<td>002121</td>
</tr>
<tr>
<td>School Branch</td>
<td>00</td>
</tr>
<tr>
<td>Vendor ID</td>
<td>VC6000156859</td>
</tr>
<tr>
<td>Tax Identification Number (TIN)</td>
<td></td>
</tr>
<tr>
<td>School Name</td>
<td>BABSON COLLEGE</td>
</tr>
<tr>
<td>Address</td>
<td>231 FOREST STREET</td>
</tr>
<tr>
<td>Address2</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>BABSON PARK</td>
</tr>
<tr>
<td>State</td>
<td>Massachusetts</td>
</tr>
<tr>
<td>Zip Code</td>
<td>02457 - 0310</td>
</tr>
<tr>
<td>Phone Number</td>
<td></td>
</tr>
<tr>
<td>Fax Number</td>
<td></td>
</tr>
<tr>
<td>School Type</td>
<td>Massachusetts Private 4-year</td>
</tr>
</tbody>
</table>

### Program: Foster Child Grant

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Name</td>
<td>Mary Smith</td>
</tr>
<tr>
<td>Contact Title</td>
<td>Director of Financial Aid</td>
</tr>
<tr>
<td>Contact Email Address</td>
<td><a href="mailto:email@email.com">email@email.com</a></td>
</tr>
<tr>
<td>Phone Number</td>
<td>222-222-2222</td>
</tr>
<tr>
<td>Fax Number</td>
<td>333-333-3333</td>
</tr>
<tr>
<td>Active</td>
<td>Yes</td>
</tr>
<tr>
<td>Fall Certification Duration</td>
<td>120</td>
</tr>
<tr>
<td>Fall Reinstated Certification Duration</td>
<td>90</td>
</tr>
<tr>
<td>Spring Certification Duration</td>
<td>120</td>
</tr>
<tr>
<td>Spring Reinstated Certification Duration</td>
<td>90</td>
</tr>
<tr>
<td>Reconciliation Duration</td>
<td>30</td>
</tr>
<tr>
<td>Hold Payments</td>
<td>No</td>
</tr>
</tbody>
</table>
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.
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.

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](image)

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.

3. Select a term.

   ![Select Academic Term]

   Close

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

   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.
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.

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

<table>
<thead>
<tr>
<th>Fall Enrollment</th>
<th>Spring Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cost of Attendance</strong></td>
<td><strong>Personal</strong></td>
</tr>
<tr>
<td>Tuition ONLY</td>
<td>Transportation</td>
</tr>
<tr>
<td>Fees</td>
<td>Child Care</td>
</tr>
<tr>
<td>Room and Board</td>
<td></td>
</tr>
<tr>
<td>Books and Supplies</td>
<td></td>
</tr>
<tr>
<td>Other Costs (Please Specify)</td>
<td></td>
</tr>
<tr>
<td>Other Costs (Please Specify)</td>
<td></td>
</tr>
</tbody>
</table>

**Estimated Family Contribution (EFC)**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>MASSGrant</td>
<td>Scholar-Internship Match Fund</td>
<td></td>
</tr>
<tr>
<td>Gilbert Grant</td>
<td>Fee Waiver</td>
<td></td>
</tr>
<tr>
<td>Cash Grant</td>
<td>FELL Grant</td>
<td></td>
</tr>
<tr>
<td>Part-Time Grant</td>
<td>Federal SEOG</td>
<td></td>
</tr>
<tr>
<td>CEAP Scholarship</td>
<td>Federal Smart Grant</td>
<td></td>
</tr>
<tr>
<td>Paraprofessional Teacher Preparation Grant</td>
<td>Academic Competitiveness Grant</td>
<td></td>
</tr>
<tr>
<td>Public Service Grant</td>
<td>Federal Work Study</td>
<td></td>
</tr>
<tr>
<td>Christian Herter Memorial Scholarship</td>
<td>No Interest Loan</td>
<td></td>
</tr>
<tr>
<td>Early Childhood Educators Scholarship</td>
<td>Direct Subsidized Loan</td>
<td></td>
</tr>
<tr>
<td>John and Abigail Adams Scholarship</td>
<td>Direct Unsubsidized Loan</td>
<td></td>
</tr>
<tr>
<td>Tuition Waiver</td>
<td>PLUS</td>
<td></td>
</tr>
<tr>
<td>National Guard Tuition Waiver</td>
<td>Federal Perkins Loan</td>
<td></td>
</tr>
<tr>
<td>National Guard Tuition/Fee Assistance</td>
<td>Institutional Grants/Scholarships</td>
<td></td>
</tr>
<tr>
<td>Massachusetts Educational Rewards Grants</td>
<td>Institutional Loan</td>
<td></td>
</tr>
<tr>
<td>Math &amp; Science Teachers Scholarship</td>
<td>TEACH Grant</td>
<td></td>
</tr>
<tr>
<td>High Demand Scholarship</td>
<td>Iraq and Afghanistan Service Grant</td>
<td></td>
</tr>
<tr>
<td>Completion Incentive Grant</td>
<td>Federal Family Education Loan Subsidized</td>
<td></td>
</tr>
<tr>
<td>Internship Incentive Program Grant</td>
<td>Federal Family Education Loan Unsubsidized</td>
<td></td>
</tr>
<tr>
<td>Other Institutional Aid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Federal (Please Specify)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other State (Please Specify)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Outside (Please Specify)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (Please Specify)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 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.
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.
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.

*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.

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

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.

   ![Search Students Screen](image)

   - Enter as much information as possible for faster response time.
   - Search Results
     - No matches found.

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

5.1 **SSN**

**DCF Adopted and Foster Child Fee Assistance**

**Academic Year 2014 - 2015**

<table>
<thead>
<tr>
<th>Student Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSN</td>
</tr>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Middle</td>
</tr>
<tr>
<td>Date of Birth</td>
</tr>
<tr>
<td>Address</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>State</td>
</tr>
<tr>
<td>Zip Code</td>
</tr>
<tr>
<td>Home Phone</td>
</tr>
<tr>
<td>Email Address</td>
</tr>
<tr>
<td>Gender</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Application Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution</td>
</tr>
<tr>
<td>002122-00, BAY PATH COLLEGE</td>
</tr>
<tr>
<td>Dependency Status</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Title IV Eligible</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Grade Level</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Degree/Certificate</td>
</tr>
<tr>
<td>Pursuing</td>
</tr>
<tr>
<td>Bachelors Degree</td>
</tr>
<tr>
<td>Already Received</td>
</tr>
<tr>
<td>Master/Doctorate</td>
</tr>
<tr>
<td>Already Received</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Financial Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fee Assistance Type</td>
</tr>
<tr>
<td>Estimated Family</td>
</tr>
<tr>
<td>Contribution(EFC)</td>
</tr>
<tr>
<td>Family Size</td>
</tr>
<tr>
<td>Parent Adjust Gross</td>
</tr>
<tr>
<td>Income</td>
</tr>
<tr>
<td>Fall DATA.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Fall Enrollment</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Number of State</td>
</tr>
<tr>
<td>Supported Fall Credits</td>
</tr>
<tr>
<td>Number of Non-State</td>
</tr>
<tr>
<td>Supported Fall Credits</td>
</tr>
<tr>
<td>Total Fall Fees Waived</td>
</tr>
<tr>
<td>(State Supported Only)</td>
</tr>
</tbody>
</table>

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

5. Click [Upload File].

6. The Upload DCF Fee Assistance Students screen is displayed.

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

   - **File:** 
     - 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.
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.

10. Once the file has completed processing, select the ‘Status’ column, the File Processing Information screen will display.

![File Processing Information](image)

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.

<table>
<thead>
<tr>
<th>Date</th>
<th>Program</th>
<th>Term</th>
<th>Type</th>
<th>Batch Number</th>
<th>Reconciled</th>
<th>Number Of Students</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/18/2014</td>
<td>MASSGrant</td>
<td>Fall</td>
<td>Payment</td>
<td>80120308</td>
<td>N</td>
<td>1</td>
<td>$85.00</td>
</tr>
<tr>
<td>11/14/2014</td>
<td>MASSGrant</td>
<td>Fall</td>
<td>Payment</td>
<td>80120277</td>
<td>N</td>
<td>1</td>
<td>$298.00</td>
</tr>
<tr>
<td>11/06/2014</td>
<td>MASSGrant</td>
<td>Fall</td>
<td>Adjustment</td>
<td>80120445-80120688</td>
<td>1</td>
<td></td>
<td>($200.00)</td>
</tr>
<tr>
<td>11/06/2014</td>
<td>MASSGrant</td>
<td>Fall</td>
<td>Adjustment</td>
<td>80120445-80120689</td>
<td>1</td>
<td></td>
<td>($298.00)</td>
</tr>
<tr>
<td>11/05/2014</td>
<td>MASSGrant</td>
<td>Fall</td>
<td>Adjustment</td>
<td>80120445-80120681</td>
<td>1</td>
<td></td>
<td>($850.00)</td>
</tr>
<tr>
<td>11/03/2014</td>
<td>MASSGrant</td>
<td>Fall</td>
<td>Adjustment</td>
<td>80120445-80120686</td>
<td>1</td>
<td></td>
<td>($50.00)</td>
</tr>
<tr>
<td>10/20/2014</td>
<td>MASSGrant</td>
<td>Fall</td>
<td>Adjustment</td>
<td>80120445-80120517</td>
<td>5</td>
<td></td>
<td>($2,398.00)</td>
</tr>
<tr>
<td>10/09/2014</td>
<td>MASSGrant</td>
<td>Fall</td>
<td>Payment</td>
<td>80120445</td>
<td>Y</td>
<td>376</td>
<td>$243,550.00</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Name</th>
<th>SSN</th>
<th>Payment Type</th>
<th>Term</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>BERGERENA, JOSelyn</td>
<td>599-99-9999</td>
<td>Payment</td>
<td>Fall</td>
<td>$800.00</td>
</tr>
<tr>
<td>MBENGAM, ANNA</td>
<td>199-99-9999</td>
<td>Payment</td>
<td>Fall</td>
<td>$800.00</td>
</tr>
<tr>
<td>PIerre, Ashley</td>
<td>299-99-9999</td>
<td>Payment</td>
<td>Fall</td>
<td>$150.00</td>
</tr>
<tr>
<td>Romanenko, Olga</td>
<td>399-99-9999</td>
<td>Payment</td>
<td>Fall</td>
<td>$800.00</td>
</tr>
</tbody>
</table>

**Total:** $2,550.00

**Total Sent To School:** $2,550.00

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.

**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.

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.
4. 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.

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

*Note: The ‘Download’ and ‘Upload’ links are only available for the MASSGrant program.*
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
         \[\text{Note: The amount paid is required if 'Paid Partial Amount' is selected.}\]
      3.1.3 Not Paid (Full Refund)
   3.2 Click [Save].
      \[\text{Note: If multiple pages of students are displayed, select a reconciliation value for students on any page and then click [Save]; all students with a selection, regardless of page, will be reconciled.}\]
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.

   ![Select Payment Batch to Reconcile](image)

2. Select the 'Download' link for a batch.

3. The Verity Criteria screen displays. Verify the batch selected, click [Download File].

   ![Verify Criteria](image)

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.
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.

```
<table>
<thead>
<tr>
<th>File Type</th>
<th>Request Date</th>
<th>Status</th>
<th>User Name</th>
<th>Aid Program</th>
<th>Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download Reconcile Payments File for Batch 60099065</td>
<td>03-05-2012</td>
<td>File request has been received and is awaiting processing</td>
<td>grahamMASS500</td>
<td>MASSGrant</td>
<td>Spring</td>
</tr>
</tbody>
</table>
```

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.

```
File Download

File is being created for download
Wait for "Save As..." dialog
Then close this window to continue
```

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 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.

2. Select the 'Upload' link for a batch.

3. The Verity Criteria screen displays. Verify the batch selected, click [Upload File].

4. The Upload Reconcile Payments File screen is displayed.

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 Screen]

- **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 Screen - All Records Processed]

Sample if all records processed

![File Processing Information Screen - Errors Found]

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.

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

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

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

3.1.3 Not Paid (Full Refund)

3.2 Click [Save].

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 to 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 Screen]

   **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 Screen]

   **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 Button]

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

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.

4. The Upload Year-End Reconciliation File screen is displayed.

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.
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.

Sample if all records processed

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**
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.

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.

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.
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 Image]

- **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 - 1111111111

[UPDATE STUDENT INFORMATION] [ADD COMMENTS]
Application Information

<table>
<thead>
<tr>
<th>Institution</th>
<th>002217-00, STONEHILL COLLEGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>State of Legal Residence</td>
<td>MA</td>
</tr>
<tr>
<td>Residence Date</td>
<td>06/01/2009</td>
</tr>
<tr>
<td>Parent State of Legal Residence</td>
<td>MA</td>
</tr>
<tr>
<td>Parent Residence Date</td>
<td>06/01/2009</td>
</tr>
<tr>
<td>SSN Match</td>
<td>SSN, Name, and DOB match</td>
</tr>
<tr>
<td>SAR C Flag</td>
<td>No Flag Set</td>
</tr>
<tr>
<td>NSLDS Override</td>
<td></td>
</tr>
<tr>
<td>NSLDS Match</td>
<td></td>
</tr>
<tr>
<td>Drug Override</td>
<td>No</td>
</tr>
<tr>
<td>Drug Conviction</td>
<td>Full-time</td>
</tr>
<tr>
<td>Anticipated Fall Enrollment</td>
<td>Full-time</td>
</tr>
<tr>
<td>Anticipated Spring Enrollment</td>
<td></td>
</tr>
<tr>
<td>Eligibility Override</td>
<td></td>
</tr>
<tr>
<td>Return Mail Indicator</td>
<td>Decline Fall Award</td>
</tr>
<tr>
<td>Decline Spring Award</td>
<td></td>
</tr>
<tr>
<td>ISIR Date Override</td>
<td>02/02/2014</td>
</tr>
<tr>
<td>FAFSA Original Application Date</td>
<td>06/27/2014</td>
</tr>
<tr>
<td>Clear All Problems Override</td>
<td></td>
</tr>
<tr>
<td>Clear All Problems Expiration Date</td>
<td>01/12/2015</td>
</tr>
<tr>
<td>1st BA Override</td>
<td></td>
</tr>
<tr>
<td>Grade Level</td>
<td>3rd Year/Junior</td>
</tr>
<tr>
<td>Bachelors Degree</td>
<td>No</td>
</tr>
<tr>
<td>Degree/Certificate</td>
<td>1st Bachelors Degree</td>
</tr>
<tr>
<td>Masters/Doctorate</td>
<td>No</td>
</tr>
<tr>
<td>Citizenship Override</td>
<td></td>
</tr>
<tr>
<td>SSA Citizenship</td>
<td>US Citizen</td>
</tr>
<tr>
<td>Award Letter Date</td>
<td>07/18/2014</td>
</tr>
<tr>
<td>Original Ineligible Letter Date</td>
<td></td>
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<tr>
<td>Current Ineligible Letter Date</td>
<td></td>
</tr>
<tr>
<td>Insufficient Res Letter Date</td>
<td></td>
</tr>
<tr>
<td>Transaction Number</td>
<td>7</td>
</tr>
<tr>
<td>NIL Eligibility Status</td>
<td>Eligible</td>
</tr>
</tbody>
</table>

UPDATE APPLICATION INFORMATION

Financial Information

| EFC | 3491 |
| Dependency Status | Dependent |
| Parent Number in Household | 4 |
| Parent Number in College | 1 |
| Parent Number of Exemptions | 4 |
| Parent AGI | 51,090 |
| Parent Taxes Paid | 814 |
| Parent Tax Form | IRS 1040 |
| 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 | |
| Student AGI | 8,372 |
| Student Tax Form | IRS 1040A or 1040EZ |
| 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 | 8,954 |

UPDATE FINANCIAL INFORMATION

ISIR Comments

<table>
<thead>
<tr>
<th>Comment Code</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>WHAT YOU MUST DO NOW (Use the checklist below to make sure that all of your issues are resolved.)</td>
</tr>
<tr>
<td>006</td>
<td>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 homepage. If your mailing address or e-mail address changes, you can make the correction online or send in the correction on your SAR.</td>
</tr>
</tbody>
</table>
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.
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 Image]

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
3.1.5 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.

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 1st 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.
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.

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)
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](image)

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](image)

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](image)

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.

    ![Cancel Disbursement Screen]

    - **Term**: Spring
    - **Amount**: $2,000.00
    - **Disbursement Date**: 01/23/2015

    Select [Save] to cancel the above disbursement.

    - **Save**
    - **Cancel**

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.
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)

   Early Childhood Educators Scholarship
   Academic Year 2014-2015

   Status: Eligible

   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

   [Buttons: PRINT LETTER, UPDATE STUDENT INFORMATION, ADD COMMENTS]
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.

![Print Letter Screen]

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.

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.

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 1st 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)

   ![PTPG Record Display](PTPG_Record_Display.png)

   Status: Eligible

   ![Student Information](Student_Information.png)

   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

   ![Buttons](Buttons.png)

   UPDATE STUDENT INFORMATION  ADD COMMENTS
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.

<table>
<thead>
<tr>
<th>Application Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Institution</strong></td>
</tr>
<tr>
<td><strong>Major</strong></td>
</tr>
<tr>
<td><strong>Expected Degree Month</strong></td>
</tr>
<tr>
<td><strong>Expected Degree Year</strong></td>
</tr>
<tr>
<td><strong>PTPG Application Date</strong></td>
</tr>
<tr>
<td><strong>PTPG Application Date Override</strong></td>
</tr>
<tr>
<td><strong>Employment Override</strong></td>
</tr>
<tr>
<td><strong>State of Legal Residence</strong></td>
</tr>
<tr>
<td><strong>Residence Date</strong></td>
</tr>
<tr>
<td><strong>Parent State of Legal Residence</strong></td>
</tr>
<tr>
<td><strong>Parent Residence Date</strong></td>
</tr>
<tr>
<td><strong>SSN Match</strong></td>
</tr>
<tr>
<td><strong>SAR C Flag</strong></td>
</tr>
<tr>
<td><strong>NSLDS Override</strong></td>
</tr>
<tr>
<td><strong>NSLDS Match</strong></td>
</tr>
<tr>
<td><strong>Drug Override</strong></td>
</tr>
<tr>
<td><strong>Drug Conviction</strong></td>
</tr>
<tr>
<td><strong>Citizenship Override</strong></td>
</tr>
<tr>
<td><strong>Fall Anticipated Credits (Initial / Updated)</strong></td>
</tr>
<tr>
<td><strong>Spring Anticipated Credits (Initial / Updated)</strong></td>
</tr>
<tr>
<td><strong>Summer 1 Anticipated Credits (Initial / Updated)</strong></td>
</tr>
<tr>
<td><strong>Summer 2 Anticipated Credits (Initial / Updated)</strong></td>
</tr>
<tr>
<td><strong>Award Letter Date</strong></td>
</tr>
<tr>
<td><strong>Summer Award Letter Date</strong></td>
</tr>
<tr>
<td><strong>Original Ineligible Letter Date</strong></td>
</tr>
<tr>
<td><strong>Current Ineligible Letter Date</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Term</strong></td>
</tr>
<tr>
<td>Fall</td>
</tr>
<tr>
<td>Spring</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Program Totals</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Cumulative Paid</strong></td>
<td><strong>$7,500.00</strong></td>
</tr>
</tbody>
</table>
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.

   **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 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.

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.

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 1st 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)
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.
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.

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
Zip Code           02155
Home Phone Number  (111)111-1111
Email Address      smith@email.email
Date Of Birth      11/11/1994
Gender             Male

SAVE  CANCEL
```

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.

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 1st 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.
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

---

**Student Information: SSN XXX XX 9673**

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>LOCKE ARIANA R</td>
</tr>
<tr>
<td>Address</td>
<td>20 MAIN STREET</td>
</tr>
<tr>
<td>City, State, Zip</td>
<td>MONSON, MA 01057</td>
</tr>
<tr>
<td>Home Phone Number</td>
<td>(222)222-2222</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:email@email.com">email@email.com</a></td>
</tr>
<tr>
<td>Date of Birth</td>
<td>08/21/1994</td>
</tr>
<tr>
<td>Gender</td>
<td>Female</td>
</tr>
</tbody>
</table>

---

**Application Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution</td>
<td>002122-00, BAY PATH COLLEGE</td>
</tr>
<tr>
<td>State of Legal Residence</td>
<td>MA</td>
</tr>
<tr>
<td>Residence Date</td>
<td>08/01/2009</td>
</tr>
<tr>
<td>Parent State of Legal Residence</td>
<td></td>
</tr>
<tr>
<td>Parent Residence Date</td>
<td></td>
</tr>
<tr>
<td>SSN Match</td>
<td></td>
</tr>
<tr>
<td>SAR C Flag</td>
<td>C Flag Set</td>
</tr>
<tr>
<td>NSLDS Override</td>
<td></td>
</tr>
<tr>
<td>NSLDS Match</td>
<td>Student Not in Default or Overpayment</td>
</tr>
<tr>
<td>Drug Override</td>
<td>No</td>
</tr>
<tr>
<td>Drug Conviction</td>
<td></td>
</tr>
<tr>
<td>Citizenship Override</td>
<td></td>
</tr>
<tr>
<td>SSA Citizenship</td>
<td>US Citizen</td>
</tr>
<tr>
<td>FAFSA Original Application Date</td>
<td>02/01/2014</td>
</tr>
<tr>
<td>FAFSA Current Application Date</td>
<td>08/12/2014</td>
</tr>
<tr>
<td>Dependency Status</td>
<td>Independent</td>
</tr>
<tr>
<td>DCF Deadline Override</td>
<td></td>
</tr>
<tr>
<td>DCF Submit Date</td>
<td>09/04/2014</td>
</tr>
<tr>
<td>1st BA Override</td>
<td></td>
</tr>
<tr>
<td>Grade Level</td>
<td>2nd Year/Sophomore</td>
</tr>
<tr>
<td>Bachelors Degree</td>
<td>No</td>
</tr>
<tr>
<td>Degree/Certificate</td>
<td>1st Bachelors Degree</td>
</tr>
<tr>
<td>Master/Doctorate</td>
<td>No</td>
</tr>
<tr>
<td>Award Letter Date</td>
<td></td>
</tr>
<tr>
<td>Original Ineligible Letter Date</td>
<td></td>
</tr>
<tr>
<td>Current Ineligible Letter Date</td>
<td></td>
</tr>
</tbody>
</table>

---
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.

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.

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.

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.

<table>
<thead>
<tr>
<th>State of Legal Residence</th>
<th>MA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residence Date</td>
<td>08/01/2009</td>
</tr>
<tr>
<td>Parent State Of Legal Residence</td>
<td></td>
</tr>
<tr>
<td>Parent Residence Date</td>
<td></td>
</tr>
<tr>
<td>SSN Match</td>
<td>SSN, Name, and DOB match</td>
</tr>
<tr>
<td>Master/Doctorate</td>
<td>1st Bachelors Degree</td>
</tr>
<tr>
<td>Degree/Certificate</td>
<td>No</td>
</tr>
</tbody>
</table>

DCF Deadline Override (checkbox)
Citizenship Override (checkbox)
NSLDS Override (checkbox)
Drug Override (checkbox)
1st BA Override (checkbox)
Bachelors Degree
Grade Level
2nd Year/Sophomore

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 1st 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

<table>
<thead>
<tr>
<th></th>
<th>Fall Enrollment</th>
<th>Spring Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cost of Attendance</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Family Contribution (EFC)</td>
<td>7992</td>
<td></td>
</tr>
<tr>
<td>MASSGrant</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Gilbert Grant</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Cash Grant</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Part-Time Grant</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Foster Child Grant</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Paraprofessional Teacher Preparation Grant</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Public Service Grant</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Christian Herter Memorial Scholarship</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Early Childhood Educators Scholarship</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>John and Abigail Adams Scholarship</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Tuition Waiver</td>
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<td>Iraq and Afghanistan Service Grant</td>
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<td>Federal Family Education Loan Unsubsidized</td>
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</tbody>
</table>
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 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)
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.

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.
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.
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.
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 1st 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.
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.
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.
3. Select ‘click here.’ The Choose an Academic Year screen is displayed.
4. Select an academic year. The Select Transfer Term screen is displayed.
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 none of terms have 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 Screen]

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.

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<th>Date</th>
<th>Batch Number</th>
<th>Program</th>
<th>Institution</th>
<th>Term</th>
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