Welcome to the MN State Grant Manager

This system allows participating colleges to import student ISIRs and college data, screen applications, award MN State Grant and report DDS batches to the MN Office of Higher Education.

MN State Grant Manager System

USER INSTRUCTIONS

DECEMBER 6, 2017

VERSION 1.2

Table of Contents

SEQUENTIAL STEPS FOR USING STATE GRANT MANAGER SYSTEM

Step #	Step	Applicable Section of User Manual
1.	Financial aid director (or main State Grant administrator) registers as a user on the State Grant Manager system with the role of **College Admin**.	**User Registration** **Note:** The email address is used as the username and cannot be used for more than one user.
2.	After approval from OHE, the **College Admin** adds all other users from the financial aid office who need to access the State Grant Manager system.	**Manage Users** **Note:** The email address is used as the username and cannot be used for more than one user.
3.	**College Admin** enters system defaults and configurations for aid year.	**Manage Aid Years, Manage Programs Manage Terms, Manage Term Vars**
4.	Import student ISIRs into the State Grant Manager database.	**Import Students ISIR** (for colleges participating in federal financial aid programs that can import ISIR batch files) **Search State ISIRS** (for colleges not participating in federal financial aid programs)
5.	Review and resolve ISIR import or duplicate records problems.	**Suspended ISIRS** **Duplicate Records Report**
6.	Review and lock ISIR transaction for each student that will be used to award State Grant.	**ISIR Function**
7.	Calculate estimated State Grant term awards for fall through spring terms (and summer if college knows student will attend) based on assumed credits set up in **Manage Programs**.	**Process Grant** (individual student meeting awarding criteria) **Batch Student Awards** (all students on system meeting awarding criteria)
8.	Perform standard financial aid processes to check student eligibility (verification, C Codes, State Grant questionnaire, etc.) and note any eligibility problems on student's eligibility record for term(s).	**Eligibility** (individual student) **Import Students Eligibility** (batch file)
9.	Enter students' actual credits prior to calculating actual State Grant term awards, if different from default estimated credits.	**Units** (individual student) **Import Student Units** (batch file)
10.	Calculate actual State Grant term awards	**Manage Term Vars** (to make any necessary changes to tuition and fees and select the official state level funding variables) **Process Grant** (individual student) **Batch Student Awards** (all students on system) **Students Awarded Report**
11.	Resolve any errors preventing award calculation.	**Process Grant** (individual student) **Batch Student Awards** (all students on system)

12.	Create State Grant DDS batch, resolve any issues preventing student records from being included in batch and save DDS batch file on college's system.	**DDS Batch Creation**
13.	Submit monthly cumulative State Grant DDS batch to OHE using OHE's SG Web Access web site (unless college uses SFTP process). Review and resolve errors on DDS batch output reports. Request funds from OHE.	NA
14.	IF necessary, recalculate State Grant actual term awards prior to disbursement of funds.	**Units** (changing individual student's credits for term) **Import Units** (updating credits for all students in units import file) **Process Grant** (individual student) **Batch Student Awards** (all students on system)
15.	Disburse State Grant funds to students.	**Awards Function** (individual student) **Award Disbursement** (all awarded students on system)
16.	Make any necessary award recalculations based on changes.	**Suspended ISIRS** (to check for and select newer ISIR transactions) **Units** (changing individual student's credits for term) **Import Units** (updating credits for all students in units import file) **Process Grant** (individual student) **Batch Student Awards** (all students on system)
17.	When necessary, lock individual student term award and/or payment amounts to prevent overrides by batch Award and Disbursement functions.	**Awards Function** (individual student)
18.	Record any student refund amounts on system.	**Awards Function** (individual student)
19.	Balance State Grant Manager record of State Grant payments with college's business office on monthly basis and resolve discrepancies.	**Students Awarded Report** **Students Paid Report**
20.	Repeat Steps 4 – 17 as new ISIRS are received.	As shown above.
21.	Report final DDS batch, close out State Grant activity and return excess State Grant balance to OHE for aid year by August 31.	NA

MN STATE GRANT MANAGER SYSTEM
USER INSTRUCTIONS VERSION 1.1

ACCESSING THE SYSTEM
User Registration

The campus financial aid director (or lead State Grant manager on campus) should register as a user on the State Grant Manager system by clicking on **Register now** in the text displayed on the **Welcome to the State Grant Manager** page, which can be accessed through the **State Grant Manager** button on the **SG Web Access** page at: https://www.ohe.state.mn.us/SSL/SG/index.cfm.

- The **College Registrations** page will then appear. The user should enter:

  - Requested information about the college
  - The user's email address which will be used for the user name on the system. **Note: An email address cannot be used for multiple users.**
  - A password created by the user (must be at least 8-characters and include at least 1 uppercase letter, 1 lowercase letter, 1 number and 1 special character).
  - The college's password for accessing the **SG Web Access** page
  - Select a **Security Question** from the drop down box and provide the answer in the **Security Answer** field.
  - Agree to the **Terms of Use** for the State Grant Manager system and distribute a printed copy to all staff who will be added as users of the system.
  - Check the **I'm Not a Robot** box.
  - Click on **Submit** to save the information or **Cancel** to cancel the transaction.

College Registrations

College info:

College Name

College Code

Address 1

Address 2

City

State

Zip

Contact

Phone (XXX-XXX-XXXX)

Admin user account:

Email

Create Password

SG Web Access   This is the college's password used to access the SG
                              Web Access screen

Security Question:

| What is your mother's maiden name? | ⌄ |

If you forget your password you will be asked the security question you choose here and prompted to enter the answer you specify below.

Security Answer:

Website terms

☐ I agree to the terms of use.

☐ I'm not a robot

This reCAPTCHA is for testing purposes only. Please report to the site admin if you are seeing this.

Submit   Cancel

- The user will then receive an automated email informing the user that s/he will be contacted by OHE once OHE approves the account.
- OHE will approve the user with the role of **College Admin** which means the user can perform the following functions on the State Grant Manager system:
  - View and edit student records for students with ISIR records listing the college's FAFSA code
  - Import student ISIRs to the State Grant Manager system.
    - Colleges participating in federal financial aid programs will import ISIR file batches they received from the U.S. Department of Education.
    - Colleges not participating in federal financial aid programs will search for student ISIR's on OHE's ISIR database and import individual ISIRs into the State Grant Manager database.
  - Export student data and reports from the State Grant Manager database, including creation of State Grant DDS batches.
  - View and resolve Suspended ISIRs.
  - Set up system defaults and configurations.
  - Approve and enter other users of the State Grant Manager system from that campus.
- Once the **College Admin** account is approved, that user can add other users from that campus's financial aid office to the State Grant Manager system.
  - Once logged into the system, click on **Account** on the left menu to open that sub-menu.
  - Click on **Manage Users.**
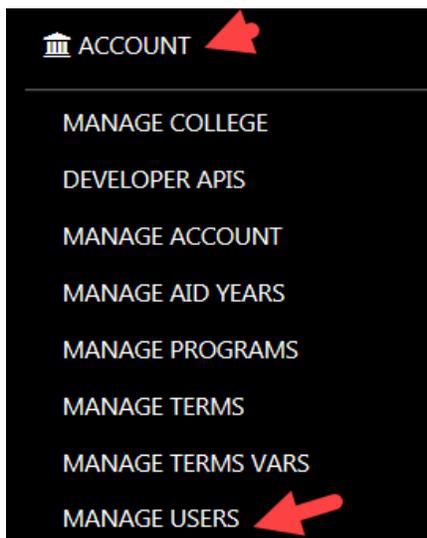
  - On the **Manage Users** screen, select **Add Users** from the **User Actions** drop down box in the upper right hand corner of the page and enter the additional user's **email** address**, Phone Number** and **College ID**.

Add User

Need Help ⑦

Email

Password

Confirm Password

Phone Number (Enter all digits with no dashes)

College Id

18

Role

Financial Adviser ⌄

Security Question

What is your mother's maiden name? ⌄

Security Answer

[Submit] [Cancel]

- o Create a **Password** for the user which is at least 8-characters in length and includes at least 1 uppercase letter, 1 lower case letter, 1 number and 1 special symbol.
- o Select the appropriate **Role** for the user.
  - ▪ The role of **College Admin** should be reserved for the financial aid director or top State Grant administrator(s) within the financial aid office.
  - ▪ The role of **Financial Advisor** should be used for non-managerial staff and student workers in the financial aid office. This role will allow the user to:
    - • View and edit student records for students with ISIR records listing the college's FAFSA code.
    - • Search for student ISIRs on OHE's ISIR database and import individual ISIRs into the State Grant Manager database (for colleges not participating in federal financial aid programs).
- o Click on **Submit** to save the entry.

Failed Password Attempt/Resetting Password

The system is set up to have users reset their password rather than retrieving a password with security questions. Passwords expire every 90 days.

- On the log in screen, click on **Forgot Your Password**.
- On the **Forgot Password** page, enter the user's email address (username) and click on **Email Link**. This will generate an automated email to the user with a link that can be used to reset the password.

- Click on the reset password link in the email and follow the steps for resetting the user's password.

MINNESOTA OFFICE
OF HIGHER EDUCATION

9/18/2017 1:38:17 PM

Please follow the link below, once you arrive at our site you will be prompted to type in a new password. Please reset your password by clicking here

Note that when resetting a user's password, the security question selected by the user when first setting up the user's original password must be selected and answered.

MAIN MENU

By using the main left sidebar menu, the user can access all functions on the State Grant Manager system. Clicking on the major functions of **Students, Account** and **Reports** will open sub-menus for those functions.
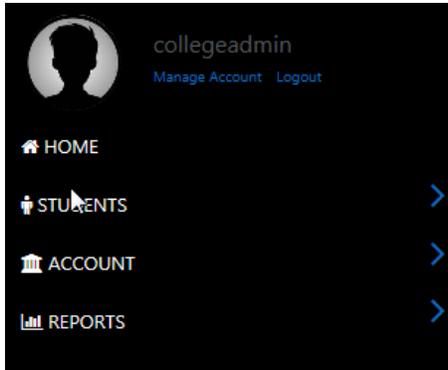
Students

Search Student
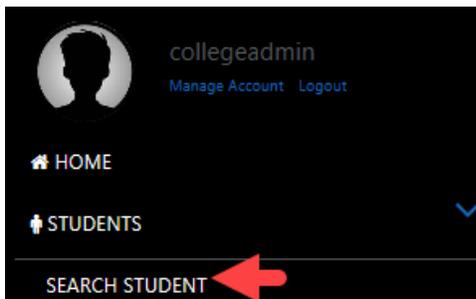
The **Search Student** page is the main page used to locate individual student records within the State Grant Manager database. This page displays the student's name, alternate name (AKA), SSN, date of birth and address. Student records can be sorted by any of the column headings displayed in blue. The user also has the option of searching for a student's record by entering the student's first name, last name or AKA in the search box at the top of the page and clicking on **Search.**

- Once the record is located, the user would click on the **Actions** box in the right hand column and then click on **Edit** to go to the **Student Details** page for more information.
- The user also has the option of deleting a student record from the **Search Student** page by clicking on **Delete** in the **Actions** box. (See **Suspended ISIRS** for further guidance prior to deleting student records.)

The **Search Student** page is not aid year specific. However, once the **Student Details** page is selected, the user can then select an aid year for which data will be retrieved.

- **Student Details Function** (accessible from th**e Search Student** page)

From the **Student Details** page, the user can access all other pages that display information about the student, such as existing ISIR records, units of postsecondary attendance, eligibility problems, calculating and displaying State Grant awards, records of transactions processed on the student's record and notes created by the user.

The user should first select the **Aid Year** from the drop down menu of aid years at the top of the **Student Details** page before using the other functions. To access these various functions from the **Student Details** page, the user can click on the blue buttons on the page or use the drop down menu in the **Student Actions** box in the top right hand corner of the page.

- **Edit Student**

- o Click on **Edit Student** under the **Student Actions** box in the top right hand corner to edit the student's name, address, SSN, or DOB.
- o The college also has the option of entering a value in the **AKA** (also known as) or **Student ID** fields from this page.

- **ISIR Function**
  - o Click on the blue **ISIR** button to access the **Search ISIR Details** page.

- o All ISIRs imported into the State Grant Manager database for the **Aid Year** selected on the **Student Details** page will then appear on the page.

  - Fields displayed are **Aid Year, Student's Name, FAFSA Application Receipt Date, ISIR Processed Date, ISIR Transaction Number, EFC** and **Parent Contribution.**

- o The user must select and lock in an ISIR transaction that will later be used to award State Grant.

  - To lock in an ISIR for use in awarding the State Grant, the user should click on the **ISIR Action** box in the right hand column and then click on **Make Active**. A check mark will then appear by the locked ISIR on the **Search ISIR Details** page.

Search ISIR Details

Selected ISIR	Aid Year	First Name	Last Name	Middle Init	FAFSA Application Receipt Date	ISIR Processed Date	ISIR Transaction #	EFC	Parent Contribution	
☑	2017-2018				7/11/2017 12:00:00 AM	7/11/2017 12:00:00 AM	1	0.00	0.00	ISIR Action ▾
☐	2017-2018				7/11/2017 12:00:00 AM	7/11/2017 12:00:00 AM	2	0.00	0.00	ISIR Action ▾
☐	2017-2018				7/11/2017 12:00:00 AM	7/11/2017 12:00:00 AM	3	0.00	0.00	View
☐	2017-2018				7/11/2017 12:00:00 AM	7/11/2017 12:00:00 AM	5	0.00	0.00	Delete / Make active

Page 1 of 1

- ▪ If the user needs to view and compare multiple ISIR records for the student, the user can click on the **ISIR Action** box in the right hand column and then click on **View** to open up an ISIR record. With the exception of the **Verification Perform**ed and **C Code Resolved** fields, the ISIR record cannot be edited by the user. All of the FAFSA-related fields on the student's ISIR record will then be displayed as well as fields for assumption and federal reject overrides, dependency status, professional judgment, reject reason codes, SAR C Flag, EFC, parent contribution, NSLDS Match Flag, and parent and student SSN match flags. Another method for locking an ISIR transaction is clicking on the blue **Make Default ISIR** button while viewing an individual ISIR record.

Student's ISIRS

Need Help ⑦

[Make Default ISIR] [Cancel]

College Aid Year
2017-2018

Verification Performed

C Code Resolved

Student SSN

Parents Medicaid/SSI

Parents Snap Benefits

Parents Free/Reduced Lunch

Parents TANF

- o Once an ISIR has been selected and locked by the user, **ISIR Selected** will appear in a green box in the upper right hand corner of the **Student Details** page. Otherwise, the default value of **No ISIR Selected** will appear in a red box.

Student Details

Need Help ⑦

Aid Year
2017-2018

ISIR selected

[ISIR] [Units] [Eligibility] [Process Grant] [Awards] [Awards Schedule] [Audit] [Notes]

- o The user has the option of unlocking a locked ISIR and selecting and locking another ISIR record by following the preceding steps for locking an ISIR. Once a different ISIR is locked, the check mark will then appear by the newly locked ISIR record and disappear from the previously locked ISIR.
- o The user can also delete an ISIR record by selecting **Delete** from the **ISIR Action** box in the right hand corner of the **Search ISIR Details** page.

Search ISIR Details

Selected ISIR	Aid Year	First Name	Last Name	Middle Init	FAFSA Application Receipt Date	ISIR Processed Date	ISIR Transaction #	EFC	Parent Contribution	
☑	2017-2018				7/11/2017 12:00:00 AM	7/11/2017 12:00:00 AM	1	0.00	0.00	ISIR Action ▾
☐	2017-2018				7/11/2017 12:00:00 AM	7/11/2017 12:00:00 AM	2	0.00	0.00	View / Delete
☐	2017-2018				7/11/2017 12:00:00 AM	7/11/2017 12:00:00 AM	3	0.00		ISIR Action ▾
☐	2017-2018				7/11/2017 12:00:00 AM	7/11/2017 12:00:00 AM	5	0.00	0.00	ISIR Action ▾

- Once an ISIR record has been deleted, it cannot be restored without reloading the original ISIR file.

- **Units Function**
  - The **Units** page, accessible from the blue **Units** button on the **Student Details** page, can be used to track the student's amount of postsecondary attendance based on the college's review of academic transcripts as well as units information written to the system when the student is awarded. Once the student has accumulated more than 93.6 (semester college) or 94.4 (quarter college) units, the student is no longer eligible to receive a MN State Grant and further term awarding will be blocked.

  - For previous attendance at another college or for previous year attendance at the current college that has not already been entered on the system, the user clicks on the blue **Add Units** button on the **Students Units** page and then manually enters information on the **Add Student Units** page.

  - Fields entered or selected by the user are:
    - **School Name:** The name of the college attended.
    - **Term Type:** Whether the college attended uses a quarter or semester system.
    - **College Terms:** The name of the term the student attended. If the term name does not appear in the drop down box, select **Historical Units**.
    - **Term:** Will display the term name selected under **College Terms**. In cases where **Historical Units** was selected for **College Terms,** the user can enter a term name in the **Term field**, such as Fall 1980, etc.
    - **Year:** The calendar year during which the term took place (e.g., 2017 for Fall 2017).

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- o **Credits:** The number of credits the student attempted during the term.
- o **Used Units:** The number of units of attendance are automatically populated by the system based on the number of credits entered and the type of term.

Add Student Units

Need Help ⑦

School Name

Term Type

Quarters

College Terms

Historical Units

Term

Year

0

Credits

0

Used Units

0

Submit   Cancel

NOTE: When entering previous postsecondary attendance the user has the option of entering the information term by term, or entering all the information under one term and changing the **Used Units** to the total units for the previous attendance.

- After manually entering units, the user should click on the **Submit** button at the bottom of the **Add Student Units** page to save the information, which will then be displayed on the main **Students Units** page. The following fields will also be displayed along with the units information entered by the college:
  - o **Reviewed:** This field is automatically populated with the date the user manually entered information on the page or the system automatically updated information on the page during the awarding process.
  - o **Reviewed by:** This field is automatically populated with the username when units are manually entered or generated by the system during the awarding process.

Students Units

Need Help ⑦

Find by Term:

Search

Add Units

School	Quarter/Sem	Year	Term	Credits	Units	Reviewed	Reviewed By	
2017 Fall	Semesters	2017	2017 Fall	12.00	9.60	9/7/2017 3:00:01 PM	collegeadmin@mn.com	Actions ▾
				Total Used	9.60			

- For attendance at the current college during the current aid year, the system initializes term credits and units information to the **Students Units** page during the estimated awarding process. This information can later be updated by the user if the student's term credits change.
  - o When first calculating an estimated State Grant award for a term, the system automatically populate units for that term on the **Students Units** page based on the student's estimated credits for the term, which come from the college's default credits for the student's program on the **Manage Programs** page.

- o The student's estimated credits should later be updated by the user on the **Students Units** page if the student's actual term enrollment credits are different from the default estimated credits. The system will then populate the **Units** field with units based on the credits entered by the user.
  - ▪ When changing the student's estimated credits to actual credits for purposes of awarding State Grant, the user must then recalculate the award using the **Process Grant** function on the **Student Details** page.

- **Eligibility Function**
  - o The **Eligibility** function, accessible through the **Eligibility** button on the **Student Details** page, is used to track any program eligibility problems for each term.

Student Details

Need Help ⑦

Aid Year

2017-2018

| ISIR | Units | Eligibility | Process Grant | Awards | Awards Schedule | Audit | Notes |

  - o The system initially assumes the student has no eligibility problems and automatically populates the **Student's Eligibility** page fields with a value of **FALSE** (no problem) when the user generates an estimated State Grant award for each term using the **Process Grant** button on the **Student Details** page.

Students Eligibility

Need Help ⑦

Find by Term:

[   ] Search

Add Eligibility

Term	Non-MN Resident	PSEO	SELF Default	Child Support Hold	Over Units	Not Meeting SAP	Graduated	Withdrawn	LOA	
2017 Fall	False	False	False	False	False	False	False	False	False	Actions ▾
2017 Summer Lead	False	False	False	False	False	False	False	False	False	Actions ▾
2018 Spring	False	False	False	False	False	False	False	False	False	Actions ▾

  - ▪ As an alternative, colleges can use the **Import Student Eligibility** function to import a file of student eligibility data rather than creating eligibility records on an individual basis using the **Process Grant** function. (See **Import Student Eligibility** for further instructions.)
  - o The user can then update any of the fields on the **Student's Eligibility** page to **TRUE** (problem exists) if the student has an eligibility problem for that term by clicking on **Edit** in the **Actions** box in the right hand column, which opens the **Edit Student Eligibility** page. The user would then place a check mark in the box next to the type of eligibility problem and click on **Submit** to save the changes.

Students Eligibility

Need Help ⑦

Find by Term:

[   ] Search

Add Eligibility

Term	Non-MN Resident	PSEO	SELF Default	Child Support Hold	Over Units	Not Meeting SAP	Graduated	Withdrawn	LOA	
2017 Fall	False	False	False	False	False	False	False	False	False	Actions ▾
2017 Summer Lead	False	False	False	False	False	False	False	False	False	Edit
										Delete

Edit Student Eligibility

Need Help ⑦

College Terms

[2017 Fall   ⌄]

Not A MN Resident
☐

PSEO
☐

SELF Default
☐

Child Support H
☑

Over Units
☐

Not Meeting SAP
☐

Graduated Student
☐

Withdrawn
☐

LOA
☐

Submit   Cancel

- If the college has entered an eligibility problem for the term, the **Process Grant** function should be used again, which will delete the estimated award and prevent the future calculation of an award for that term.

o The eligibility fields for each term are as follows:

- **Non-Minnesota Resident:** If set to **TRUE**, the user has indicated the student does not meet the state residency requirement for the term. **FALSE** indicates the student meets the residency requirement. (In general, failing to meet the state residency requirement affects all terms during the aid year, so eligibility records for all terms should be set to **TRUE**.)

- **PSEO:** If set to **TRUE**, the user has determined the student is currently enrolled in PSEO classes for that term and is not eligible for a State Grant. **FALSE** indicates the student is not enrolled in PSEO classes.

- **SELF Default:** If set to **TRUE**, the user has determined the student is on a SELF default hold for that term. **FALSE** indicates the student is not on a SELF default hold for that term.

- **Child Support Hold:** If set to **TRUE**, the user has determined the student is on a child support arrears hold for that term. **FALSE** indicates the student is not on a child support arrears hold for that term.

- **Over Units:** If set to **TRUE**, the user has determined the student has already exceeded the units of postsecondary education cutoff for the State Grant program at the onset of that term. **FALSE** indicates the student has not yet reached the units cutoff at the onset of that term.

- **Not Meeting SAP:** If set to **TRUE**, the user has determined the student is not making satisfactory academic progress at the onset of the term. **FALSE** indicates the student does not have a SAP problem at the onset of the term.
- **Graduated:** If set to **TRUE,** the user has determined the student has graduated as of the onset of the term. **FALSE** indicates the student has not yet graduated as of the onset of the term.
- **Withdrawn:** If set to **TRUE,** the user has determined the student has withdrawn as of the onset of the term. **FALSE** indicates the student has not withdrawn as of the onset of the term.
- **LOA:** If set to **TRUE,** the user has determined the student is on a leave of absence as of the onset of the term. **FALSE** indicates the student is not on a leave of absence as of the onset of the term.

o The user can also delete an eligibility record by clicking on **Delete** in the **Actions** box in the right hand column on the **Student's Eligibility** page.
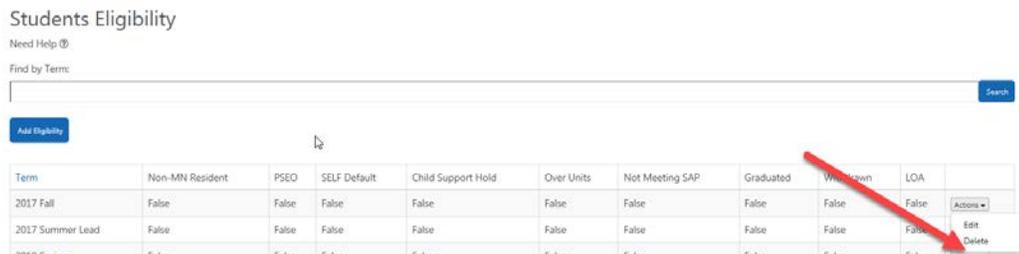
- **Process Grant Function**
  o The **Process Grant** function is used to calculate an individual student's State Grant award for the term. This function must be performed separately for each term during the aid year. Alternatively, the user may use the **Batch Student Awards** function to calculate term awards for all students in the system meeting awarding criteria.
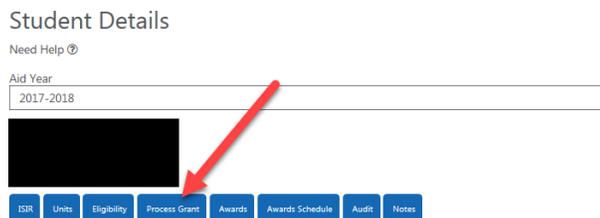
  o After clicking on **Process Grant** from the **Student Details** page, the user is taken to the **Student Grant** page where the following fields should be populated to calculate the student's estimated State Grant for the term:

Student Grant

Need Help ⑦

Aid Year
2017-2018

Program
Liberal Arts

Term
2017 Fall

Tuition Cap
Four Year

Remaining Program Hours
125

Origin Type
Assumptions When EFC Calculated

Award Type
Actual
Estimate

Submit

- **Aid Year**: The aid year during which the term award will take place. This is automatically populated by the system based on the **Aid Year** value selected by the user on the **Student Details** page.
- **Program**: From the drop down box, the user should select the program used to calculate the student's award for the term. The program values that appear are based on those entered by the user when setting up system default values on the **Manage Programs** page. The **Program** selected will determine the default credits used to calculate the student's initial term award. (See **Manage Programs** for further information.) After an initial term award has been calculated using default credits, the system will then use the term credits from the student's **Units** record for the term for any future award calculations for that term.
- **Term**: From the drop down box, the user should select the term for which the award will be calculated. The terms shown will be based on those entered by the user on the **Manage Terms** page. Since each **Program** created by the user under **Manage Programs** must have its own set of terms, there may be multiple terms to select from, e.g., 2018 Fall Lib Arts, 2018 Fall Engineering, etc. However, most users will only have one **Program** and one set of associated terms.
- **Tuition Cap**: This field determines the appropriate tuition and fee cap to use within the State Grant award calculation based on the type of program in which the student is enrolled. From the drop down box, select either:
  - **Four Year** (typically for bachelor's degree programs)
  - **Two Year or Less** (typically for associate's degrees or certificate programs)
- **Remaining Program Hours** (appears only for clock hour schools): If the student's remaining program hours are less than the number of hours in the student's

payment period, the remaining program hours must be entered in this field. The term award will then be prorated by the result of the remaining program hours divided by the number of hours in the payment period. For example, if the remaining program hours were 400 and the payment period hours were 750, the term award would be prorated by 53.3 percent (400/750). Any value greater than zero in this field will override any value entered in the **Remaining Program Hours** field in the school's defaults (**Term Vars** screen) for that term. After prorating a student's term award, the school must edit the term award from the **Student Awards** screen and lock the award. This prevents any subsequent award calculations for the term from overriding the prorated term award.

- **Origin Type:** This field is sent on the State Grant DDS record to inform OHE whether or not federal need analysis assumptions were used in the calculation of the student's Expected Family Contribution (EFC). The value entered for the last term awarded during the aid year will be sent on the DDS record. The student's ISIR or Student Aid Report (SAR) will indicate whether assumed values were used in the calculation of the EFC. The value initially displayed in this field comes from the default value selected by the user in the system defaults under **Manage Aid Years**.
  - Select a value of **Assumptions When EFC Calculated** if assumptions were used.
  - Select a value of **Don't User Assumptions When Calculating EFC** if assumptions were not used or were overridden by the financial aid administrator.
- **Award Type**: The user should first select a value of **Estimate** from the drop down box when first calculating a student's award. This will:
  - Automatically create and populate an **Eligibility** record for the selected term with values of **FALSE** (no eligibility problems) on the **Student Eligibility** page;
  - Automatically create and populate a **Units** record for the selected term on the **Student's Units** page based on the estimated credits for the program selected.
  - Calculate an estimated State Grant award for the term selected and bring the user to the **Student Awards** page where the term award is displayed.

- Awarding criteria are as follows:
  - A **Units** and **Eligibility** record for the term must exist. (These are created by first calculating an estimated award for the term using either the **Process Grant** function for an individual student or the **Batch Student Awards** process using a value of **Estimate** for the award type.)
  - An ISIR record has been selected and locked for the student.
  - The locked ISIR record was not rejected (e.g., lacked signatures, missing data, etc.) by the federal processor.
  - The student did not indicate on the FAFSA that s/he is graduate/professional student or has a baccalaureate degree.
  - The student's **Eligibility** record for the term does not have a value of **TRUE** (problem exists) for any of the eligibility criteria.

- If the award cannot be calculated due to an eligibility problem, an error message will appear on the top of the screen which includes the specific eligibility criteria not met.
  - For those students selected for verification, the **Verification Performed** field on the student's ISIR page has been set to **Performed** by the user.
  - For those students with a C Flag problem on their ISIR/SAR, the **C Code Resolved** field on the student's ISIR page has been set to **Resolved**.
  - The student's existing term award has not been locked by the user.
- After the student's estimated State Grant award is calculated for a term, the college can use the **Process Grant** function's **Student Grant** page to calculate the actual term award, in cases where any of the award parameters or data used in the estimated award calculation have changed (e.g., student's term credits, student's program, student's degree type, etc.). **NOTE:** There is no need to calculate an actual term award if the estimated term award is correct. To calculate an actual term award:
  - Enter the student's actual term credits by editing the term's **Units** record written to the system when the estimated award was first calculated.
    - Click on **Units** from the **Student Details** page.
    - Find that term's units information on the **Students Units** page and click on **Edit** on the **Actions** drop down box in the right hand column.
    - Enter the student's actual term credits in the **Credits** field on the **Edit Student Units** page and click on **Submit**.

Edit Student Units

Need Help ⑦

School Name
2017 Fall

Term Type
Semesters

College Terms
2017 Fall

Term
2017 Fall

Year
2017

Credits
12.00

Used Units
9.60

Submit   Cancel

  - Click on **Process Grant** from the **Student Details** page and enter current values for all the fields on the **Student Grant** page.
    - Be sure to change the **Award Type** value from **Estimate** to **Actual**.
      - If the user changes the value for either **Program** or **Term** (if there are multiple term names for the same term)
        - Delete the previous estimated term award.
        - First calculate an estimated term award with the new information and then calculate an actual term award for the same term.
    - Click on **Submit** to recalculate the term award.

Student Grant

- **Awards Function**
  - By clicking on **Awards** from the **Student Details** page, the user is taken to the **Student Awards** page which displays all of the student's term awards for the aid year.

  - The following fields are displayed for each term award on the **Awards** page:
    - **Term:** Displays the term for which the State Grant has been awarded.
    - **Credits:** Displays the credits used to calculate the term award.
    - **Award Calculated:** Displays the date the current term award was calculated.
    - **Award:** Displays the amount of the State Grant award for the term.
    - **Disbursement:** Displays the disbursement date for the term payment.
    - **State Grant Paid:** Displays the amount of the State Grant paid for the term.
    - **State Grant Refund:** Displays any term refund amount entered by the user.
    - **Locked:** Displays whether the user locked **(TRUE)** the **Award Calculated** and **State Grant Paid** amount to prevent system overrides. Otherwise, the default value is **FALSE**.
    - **Grant Overview:** Displays all the parameters used to calculate the term award:
      - **Estimated** or **Actual Award:** The text will indicate whether the term award is **Estimated** or **Actual**.
      - **Dependency Status:** Will display the student's dependency status:
        - **Dependent**
        - **Independent without Dependents**
        - **Independent with Dependents**

- **Two or Four Year Program:** Displays whether the two or four-year tuition and fee cap was used to calculate the term award.
- **Term Credits:** Displays the student's term enrollment level in credits
- **Tuition and Fees:** Displays the lesser of the college's actual tuition and fees or the tuition and fee cap for the student's enrollment level.
- **LME:** Displays the living and miscellaneous expense allowance for the student's enrollment level.
- **SG Budget:** Displays the sum of the tuition and fees plus the LME for the term.
- **Student Share:** Displays the 50 percent share of the SG Budget that is assigned to the student.
- **Parent Contribution or Independent Student Contribution:** Displays either the prorated parent contribution (dependent student) or independent student contribution (independent student) subtracted within the term award calculation.
- **Pell Grant :** Displays the student's Pell Grant for the term, based on the student's Pell Grant enrollment level.
- **State Grant:** Displays the amount of the student's State Grant term award calculated by the system.

Student Awards

Need Help ⑦

Find by Term:

Term	Credits	Award Calculated	Award	Disbursement	State Grant Paid	State Grant Refund	Locked	Grant Overview	
2017 Summer Lead	15.00	9/1/2017 2:24:55 PM	898.00	9/1/2017 2:26:46 PM	898.00	0.00	False	Actual Award Dependent Student Student is enrolled in a four year program Student is taking 15.00 credit load Tuition + Fees: $3,150.00 LME: $4,568.00 SG Budget: $7,718.00 Student Share: $3,859.00 Parent Contribution: $0.00 Pell Grant: $2,960.00 Student has been granted a State Grant of $898.00	Actions ▾
2018 Spring Main	15.00	8/23/2017 9:38:42 AM	772.00		0.00	0.00	False	Actual Award Dependent Student Student is enrolled in a two year program Student is taking 15.00 credit load Tuition + Fees: $2,895.00 LME: $4,568.00 SG Budget: $7,462.00 Student Share: $3,731.00 Parent Contribution: $0.00 Pell Grant: $2,960.00 Student has been granted a State Grant of $772.00	Actions ▾

- **Actions:** By clicking on **Actions**, the user can either **Edit** or **Delete** the term award record.

Student Awards

- **Deleting** the award record will also delete the corresponding **Units** record for the term.
  - The user should recreate the **Units** record if the student is actually enrolled for the term. (See **Units Function** for further instructions.)
- The following fields can be **edited:**
  - The amount of the **State Grant Paid** (since there is a separate field to enter refunds, the payment amount does not need to be manually reduced by the user).
  - Enter any **State Grant Refund** amount for the term.
  - Edit the **Disbursement Date** for the term.
  - If required, lock in the amount of the **Award Calculated** and **State Grant Paid** for the term by clicking on the box next to **Locked.** This will prevent the term award and term payment from being revised by any future award recalculations or payment processes.
    - **Example:** Locking a term payment might be used for a student attending a clock hour college in cases where the student's term payment for the final payment period needs to be prorated because remaining program hours are less than the number of hours in the payment period.
  - To save any edits, click on **Submit**, which will bring the user back to the **Student Awards** page.

Edit Awards

- **Awards Schedule Function**
  - By clicking on **Awards Schedule** from the **Student Details** page, the user is taken to the **Student Award Schedule** page, which displays the amount of the student's State Grant term award for every enrollment level from full-time (15 credits) down to three credits per term.

Student Details

Need Help ⑦

Aid Year

2017-2018

| ISIR | Units | Eligibility | Process Grant | Awards | Awards Schedule | Audit | Notes |
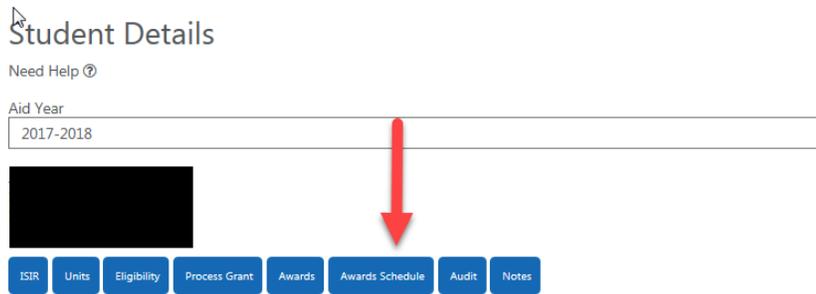
Student Award Schedule

Need Help ⑦

ISIR selected

Term	15 Credits	14 Credits	13 Credits	12 Credits	11 Credits	10 Credits	9 Credits	8 Credits	7 Credits	6 Credits	5 Credits	4 Credits	3 Credits
2017 Fall	772	521	275	0	515	269	0	509	262	0	503	256	0
2018 Spring	772	521	275	0	515	269	0	509	262	0	503	256	0
2018 Summer	772	521	275	0	515	269	0	509	262	0	503	256	0
2017 Summer Lead	772	521	275	0	515	269	0	509	262	0	503	256	0

  - In cases where the student's term award is deleted during the **Process Grant** or **Batch Student Awards** process due to a term eligibility problem, the corresponding term award schedule for that term is set to zeros.
  - This page is a useful tool for informing students about award revisions based on enrollment level.
  - This page is for display only and cannot be edited by the user.

- **Audit Function**
  - By clicking on **Audit** from the **Student Details** page, the user is taken to the **Student Audit** page which displays information about past edits to the student's term award records on the system.

Student Details

Need Help ⑦

Aid Year

2017-2018

| ISIR | Units | Eligibility | Process Grant | Awards | Awards Schedule | Audit | Notes |
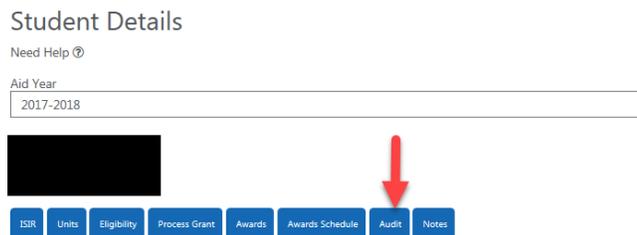
  - This page is particularly useful for researching changes to the student's State Grant term awards and parameters used to calculate awards.
  - This page is for display only and cannot be edited by the user.

Student Audit

Need Help ⑦

College Terms	Old Grant Amt	New Grant Amt	Updated By	Updated	Grant Overview
2017 Fall	-1.00	376.00	collegeadmin@mn.com	7/13/2017 10:48:39 AM	Estimated Award Dependent Student Student is enrolled in a two year program Student is taking 15 credit load Tuition + Fees: $2,104.00 LME: $4,568.00 SG Budget: $6,671.00 Student Share: $3,336.00 Parent Contribution: $0.00 Pell Grant: $2,960.00 Student has been granted a State Grant of $376.00
2017 Fall	376.00	0.00	collegeadmin@mn.com	7/13/2017 10:50:18 AM	Actual Award Dependent Student Student is enrolled in a two year program Student is taking 20.00 credit load Tuition + Fees: $0.00 LME: $0.00 SG Budget: $0.00 Student Share: $0.00 Parent Contribution: $0.00 Pell Grant: $2,960.00 State Grant: $0.00 Student did not get a state grant they are a no need student!

- **Notes Function**
  - o By clicking on **Notes** from the **Student Details** page, the user is taken to the **Student Notes** page which displays any notes previously entered by the user.

    Student Details

    Need Help ⑦

    Aid Year

    2017-2018

    [ ] Units Eligibility Process Grant Awards Awards Schedule Audit Notes

  - o Click on **Add Notes**, which opens the **Add Student Note** page, and type in the text for a note and then click **Submit** to save the note.

    Add Student Note

    Need Help ⑦

    Notes

    File ▾ Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾ Tools ▾

    Formats ▾ B I ≡ ≡ ≡ ≡ ≔ ▾ ≔ ▾ ⬌ ⬌ 🔗 🖼 ⟨⟩

    This student plans to withdraw during spring term.

    p

    Submit Cancel

  - o If notes exist for a student, a **Student Has Notes** message appears in a green box in the upper right hand corner of the **Student Details** page.

Student Details

o Any existing student notes can later be edited or deleted by clicking on **Edit** or **Delete** in the **Actions** box drop down in the right hand column on the **Student Notes** page.

Student Notes

After the user has locked in an ISIR transaction for the student, data from that ISIR transaction will then appear in the following columns/fields under **Student Overview** on the **Student Details** page:

- **Dependency Status**
  o Displays whether the student is **Dependent**, an **Independent without Dependents** or an **Independent with Dependents**. If the student's ISIR met the criteria for a federal reject, a check mark will appear next to **Dependent Rejected** or **Independent Rejected**.

Student Details

- **Eligibility Status**

- o Displays the eligibility status fields from the last term of the aid year entered on the **Student's Eligibility** page. A check mark (or absence of) next to any of these fields does NOT necessarily mean the student is ineligible/eligible for every term during the aid year. The user must access the **Students Eligibility** page for further term eligibility information by clicking on the **Eligibility** button on the **Student Details page.**
  - **Eligible:** This field is automatically checked when the student's ISIR is locked. The check mark will disappear if there is an eligibility problem entered by the user for the last term of the aid year on the **Student's Eligibility** page.
  - **Non-Minnesota Resident:** If checked, the user has indicated the student does not meet the state residency requirement for the last term of the aid year entered on the **Student's Eligibility** page.
  - **Over Units:** If checked, the user has determined the student has exceeded the units of postsecondary education cutoff for the State Grant program for the last term of the aid year entered on the **Student's Eligibility** page.
  - **Hold Status:** If checked, the user has determine the student either has a child support arrears hold or SELF loan default hold for the last term of the aid year entered on the **Student's Eligibility** page.
  - **Not Meeting SAP:** If checked, the user has determined the student is not making satisfactory academic progress for the last term of the aid year entered on the **Student's Eligibility** page.
  - **Graduated:** If checked, the user has determined the student has graduated prior to the last term of the aid year entered on the **Student's Eligibility** page.
  - **LOA:** If checked, the user has determined the student is on a leave of absence during the last term of the aid year entered on the **Student's Eligibility** page.
  - **Withdrawn:** If checked, the user has determined the student has withdrawn prior to the last term of the aid year entered on the **Student's Eligibility** page.

- **PSEO:** If checked, the user has determined the student is currently enrolled in PSEO classes for the last term of the aid year entered on the **Student's Eligibility** page.

o **Verification Performed**
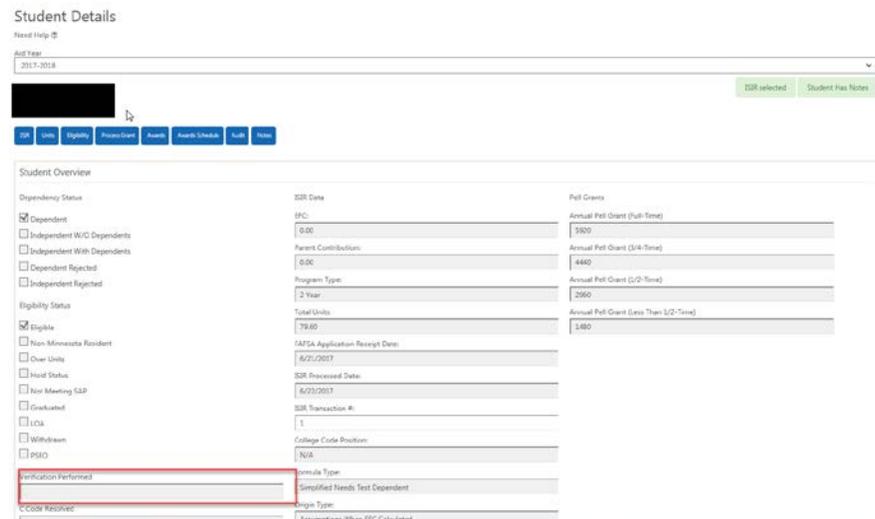
- This field displays the value in the **Verification Performed** field from the **Student's ISIR** page. In cases where the value must be changed, the user must edit from the **Student's ISIR** page.
  - If the student's locked ISIR was selected for verification (**Student Selected for Verification** field on **Student's ISIR** page is Y) the value in **Verification Performed** is automatically set to **Required**. Otherwise it is set to **Not Required**.
  - Once the user completes verification, the value of **Required** should be changed to **Performed** by the user so that term awarding will not be blocked. A value of **Performed** will not be overwritten by subsequently locking another ISIR record.

o **C Code Resolved**
- This field displays the value in the **C Code Resolved** field from the **Student's ISIR** page. In cases where the value must be changed, the user must edit from the **Student's ISIR** page.
  - If the student's locked ISIR was flagged for a C code (**SAR C Flag** field on **Student's ISIR** page is Y) the value in **C Code Resolved** field is automatically set to **Required**. Otherwise it is set to **Not Required**.
  - Once the user resolves the C code, the value of **Required** should be changed to **Resolved** by the user so that term awarding will not be blocked. A value of **Resolved** will not be overwritten by subsequently locking another ISIR record.

- **ISIR Data Column**

- o Once the user locks in an ISIR record for the student, the following fields will be displayed on the **Student Details** screen under the ISIR Data column:
  - **EFC:** The student's 9-month annual Federal Expected Family Contribution
  - **Parent Contribution:** The student's 9-month annual federal parent contribution

- **Program Type:** Whether the student is enrolled in a 4-year or 2-year program. This value is populated by the college's **Default Tuition Cap** value on the **Manage Aid Years** page and can be changed on the **Student Grant** page when the user calculates the student's State Grant award for a term. (See **Process Grant** page for further details.)
- **Total Units:** Displays total units of postsecondary attendance stored on the **Students Units** page which can be accessed by clicking on the **Units** button on the **Student Details** page.
- **FAFSA Application Receipt Date:** The date the student's original FAFSA was received by the FAFSA processor. This is the date used to determine if the student's application was received prior to the application deadline for that term (30th day of the term or payment period).
- **ISIR Processed Date:** The date the locked ISIR transaction was processed on the federal system.
- **ISIR Transaction #:** Shows which ISIR transaction is locked in by the user.
- **College Code Position:** Displays the position of the user's college within the 10 college code fields on the student's locked ISIR.
- **Formula Type:** Shows which type of federal need analysis formula was used to calculate the student's EFC on the locked ISIR:
  - Full Needs Test Dependent
  - Full Needs Test Independent without Dependents
  - Full Needs Test Independent with Dependents
  - Simplified Needs Test Dependent
  - Simplified Needs Test Independent without Dependents
  - Simplified Needs Test Independent with Dependents
- **Origin Type:** This field is sent on the State Grant DDS record to inform OHE whether or not federal need analysis assumptions were used in the calculation of the student's Expected Family Contribution (EFC). The value entered for the last term awarded during the aid year will be sent on the DDS record. The student's ISIR or Student Aid Report (SAR) will indicate whether assumed values were used in the calculation of the EFC. The value initially displayed in this field comes from the default value selected by the user in the system defaults under **Manage Aid Years**. If the user needs to change the value in this field, it must be edited on the **Student Grant** page during the **Process Grant** function or when using the **Batch Student Awards** function.
  - Select a value of **Assumptions When EFC Calculated** if assumptions were used.
  - Select a value of **Don't Use Assumptions When Calculating EFC** if assumptions were not used or were overridden by the financial aid administrator.
- **Pell Grants Column:**
  - Displays the student's annual full-time, three-quarter time, half-time and less than half-time Pell Grant award based on the EFC on the locked ISIR record.

Add Student

- It is unlikely that colleges will need to use this function since they will import student data either through the **Import Student ISIRS** or **Search State ISIRS** functions. OHE is reserving space for this function on the system to determine if there is a need for its use.

Import Students ISIR

Colleges participating in federal financial aid programs will be responsible for importing their own ISIR files into the State Grant Manager system using the **Import Students ISIR** function under the **Students** menu. (Colleges that do not participate in federal financial aid programs will need to manually select and import individual student ISIR records from OHE's ISIR database using the **Search State ISIRS** function under the **Students** menu.)

- Click on **Students** on the left menu to open that sub-menu.
- Click on **Import Students ISIR** on the sub-menu to open that page.
- Select the appropriate **Aid Year** that corresponds to the ISIR file(s) being imported
- Click on **Browse** to select the ISIR file on the college's system that will be imported
- Once the ISIR file is selected, click on **Submit** to import the ISIR file.
    - o During the import process, a task bar will appear on the page to display progress.
    - o Upon completion of the file load, the page will display information about student ISIR records that were not loaded because the student already had a locked ISIR in place on the system.
- **NOTE:** Because loading a large number of individual ISIR files can be a time consuming process, colleges may wish to order a Year-to-Date (YTD) ISIR file from the federal system when first loading ISIRs to the State Grant Manager system for an aid year. In some cases, the large size of a YTD ISIR file may exceed buffer and file size limits for OHE's web server, in which case, the college will encounter an error message when attempting to load the YTD ISIR file. In these cases, the college should contact the OHE Grant Unit which can request that IT staff temporarily increase the buffer and file size limitations for this purpose. Large ISIR files may take several minutes to load. For example, a YTD ISIR file with 7,600 records takes approximately 30 minutes to load to the system.

Import Students

Please upload the Federal ISIR File here.

Uploaded file processed!

AMY ANDERSON : there are issues with the record. Student has an isir in use for this aid year.
BETTY BENSON : there are issues with the record. Student has an isir in use for this aid year.
LARRY LITTLE : there are issues with the record. Student has an isir in use for this aid year.
SHIRLEY MANSON : there are issues with the record. Student has an isir in use for this aid year.

Need Help ⑦

Aid Year

2017-2018

	Browse...

[Submit] [Cancel]

- After importing all ISIR files, select **Suspended ISIRS** from the **Students** menu, which will display information about ISIR records that could not be imported without further review by the user. (See **Suspended ISIRS** for further details.)

Suspended ISIRS

When a college uploads an ISIR file into the State Grant Manager system, certain ISIR records are not loaded to the system and are placed in a suspense file awaiting resolution.
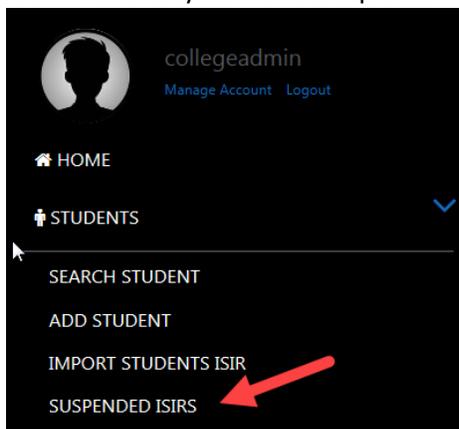
This occurs when:

- There is an existing locked ISIR in the State Grant Manager database for the student and the college must review both the incoming and existing ISIR records to determine whether it wants to import the incoming ISIR record.

Suspended ISIRS

Need Help ⓘ

Find by First Name or Last Name:

[   ] [Search]

Selected ISIR	Aid Year	First Name	Middle Name	Last Name	SSN	DOB	FAFSA Application Receipt Date	ISIR Processed Date	ISIR Transaction #	EFC	Parent Contribution	Reason For Hold	
☑	2017-2018	AMY	A	ANDERSON	811111111	1/1/4996 12:00:00 AM	7/10/2017 12:00:00 AM	7/11/2017 12:00:00 AM	5	0.00	0.00	Hold placed on this record because student has an isir for the same aid year in use.	Actions ▾
☐	2017-2018	AMY	A	ANDERSON	811111111	1/1/4996 12:00:00 AM	7/10/2017 12:00:00 AM	7/11/2017 12:00:00 AM	6	0.00	0.00	Hold placed on this record because student has an isir for the same aid year in use.	Actions ▾
☑	2017-2018	BETTY		BENSON	822222222	2/2/3994 12:00:00 AM	7/11/2017 12:00:00 AM	7/11/2017 12:00:00 AM	5	0.00	0.00	Hold placed on this record because another student has used the same SSN.	Actions ▾
☐	2017-2018	BILLY		BLAKE	822222222	3/1/1996 12:00:00 AM	7/11/2017 12:00:00 AM	7/11/2017 12:00:00 AM	5	0.00	0.00	Hold placed on this record because another student has used the same SSN.	Actions ▾

- The student's last name and date of birth on the incoming ISIR record do not match those on a pre-existing record under the same SSN in the State Grant Manager database.
  - o If an incoming ISIR was suspended for this reason but the pre-existing record in the database is actually for the *same student*, the college can delete the incorrect pre-existing record from the State Grant Manager database using the **Delete** function on the **Student Search Page** and then select and lock the new ISIR record.
    - ▪ When deleting a student record from the State Grant Manager database, the system will produce a warning message if there are existing award records for that student on the system.
    - ▪ The user should print all existing student pages prior to deleting student records so the information can be reentered, if necessary, after the user locks the student's correct ISIR record for all affected aid years.

Search State ISIRS

Colleges that do not participate in federal financial aid programs will need to manually search for and import individual student ISIRs from the OHE ISIR database using the **Search State ISIRS** function. The college must first have written authorization (Appendix 23 in the State Grant manual) from the student to access the student's ISIR record on OHE's ISIR database.
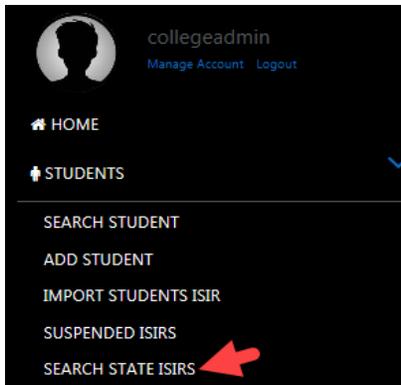
- Click on **Students** on the left menu to open that sub-menu.
- Click on **Search State ISIRS** on the sub-menu to open that page.
- Enter the following fields EXACTLY as they appear on the student's ISIR/SAR, since all must match the corresponding fields on the student's ISIR record:
  - **Student SSN:** Enter the student's 9-digit SSN without dashes as it appears on the ISIR/SAR.
  - **First name:** Enter the student's first name as it appears on the ISIR/SAR.
  - **Last Name:** Enter the student's last name as it appears on the ISIR/SAR.
  - **Aid Year:** Enter the aid year for which the ISIR was processed.
  - **Date of birth:** From the drop down calendar, select the student's date of birth as it appears on the ISIR/SAR.
  - **FAFSA application receipt date**: From the drop down calendar, select the application receipt date as it appears on the ISIR/SAR. This represents the date the student's original FAFSA was received by the FAFSA processor.

- Click on **Search** to search for the student's ISIR(S) on OHE's ISIR database.
- Once any existing ISIRs are displayed, click on the **Select** box for the ISIR transaction that should be imported into the State Grant Manager system and then click on **Import Selected ISIRs.**

Select	First Name	Last Name	Middle Init	Date Of Birth	SSN	FAFSA Application Receipt Date	ISIR Processed Date	ISIR Transaction #	EFC	Parent Contribution
☑						5/10/2017 12:00:00 AM	9/6/2017 12:00:00 AM	4	0	
☐						5/10/2017 12:00:00 AM	5/11/2017 12:00:00 AM	1		
☐						5/10/2017 12:00:00 AM	8/30/2017 12:00:00 AM	3	0	
☐						5/10/2017 12:00:00 AM	7/20/2017 12:00:00 AM	2	0	

[Import Selected ISIRs]

- Go to **Search Student** under the main **Student** menu to make sure the student's ISIR was imported into the State Grant Manager database.
    - If this is the ISIR transaction the college will use to award State Grant, the college can lock the ISIR transaction (see **ISIR Function** for further steps).
- If the ISIR search is unsuccessful, an error message will appear on the page. An unsuccessful search can be due to any of the following reasons:
    - OHE has not yet received the ISIR transaction (it generally takes 3 to 5 business days for OHE to receive and load the student's ISIR from the date the transaction was processed on the federal system).
    - OHE has the ISIR record, but the identifiers entered by the college on the **Search State ISIRS** page do not match those on the ISIR record.
    - OHE will not receive the ISIR record because the student's state of legal residence on the ISIR is not Minnesota and the student did not list a federally-eligible Minnesota college on the FAFSA (this includes Minnesota colleges not participating in federal financial aid programs).
        - If the student's current state of residence is actually a state other than Minnesota, the college should have the student add any eligible Minnesota college code as a FAFSA correction so that OHE will receive the ISIR record.
            - **Example:** A student who graduated from a Minnesota high college while residing in Minnesota now lives in Wisconsin but physically attends a Minnesota college. In this case, the state of legal residence on the FAFSA would be Wisconsin. In order for OHE to receive an ISIR record, the student must list a Minnesota college code on the FAFSA even if the student will not attend that college.

Import Students Eligibility

This optional function can be used by colleges to import a file of student eligibility values rather than manually entering individual student eligibility data on the **Student's Eligibility** page or having a term eligibility record created by the system when an estimated State Grant is calculated using the **Process Grant** function.
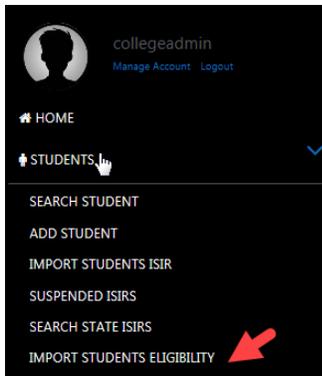
Import Student Eligibility

Download Example File

Need Help ⑦

- The user (or the user's system) should create an Excel .cvs file of student eligibility values according to the **Download Example File** sample located just under the page title:
  - **studentid:** student's 9-digit Social Security Number with no dashes. Leading zeros.
  - The PSEO through LOA columns are all student eligibility fields on the **Students Eligibility** page. The file should contain a value of **TRUE** (problem exists for term) or **FALSE** (no problem exists) for each of these fields.
  - **termcode**: term code associated with that term (see also **Manage Terms** for code information)
  - **aidyear:** the last year in the aid year (e.g., 2019 for the 2018-2019 aid year).
- Save the file as .cvs rather than .xls or .xlsx.
  - The file can contain eligibility values for multiple students.
  - The file can contain eligibility values for one or more terms of the aid year, since there is a term indentifier on each eligibility import record.
  - Each student's eligibility values for one term constitute a separate record within the import file.
- Use the **Browse** button on the page to locate the import eligibility file on the user's system and then click on **Submit** to import the eligibility file.
  - During the import process, a task bar will appear on the page to display progress and eventually indicate whether the file import was successful.
  - A message will appear on the screen for each record in the import file indicating if the record was successfully uploaded or rejected due to errors.

Import Student Units

This optional function can be used by colleges to import a file of student units of postsecondary attendance rather than manually entering individual student units data on the **Students Units** page or having a term units data record written by the system when the **Process Grant** function calculates an estimated term award. (**NOTE**: While the system automatically populates the number of units when term credits are manually entered on the system, the **Import Student Units** function requires the user to populate the units field on the import record based on the student's attempted credits.)
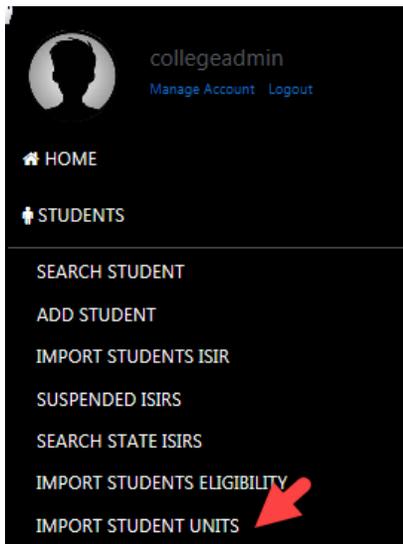
- The user (or the user's system) should create an Excel .cvs file of student units data according to the **Download Example File** sample located just under the page title:
  - **schoolname:** the name of the college the student attended.
  - **studentid:** student's 9-digit Social Security Number without dashes.
  - **credits:** the number of attempted credits for the term the student attended.
  - **unitsused:** the number of units of postsecondary attendance based on the student's attempted credits for the term.
  - **termvalue:** the term name, e.g., Fall 2015.
  - **termyear:** the last year of the aid year in which the term took place (e.g., 2019 for the 2018-2019 aid year).
  - **termtype:** enter either **quarter** or **semester** for the type of term attended.
  - **termcode:** If the record contains units information for the current college, enter the **term code** as found on the college's **Manage Terms** record for that term. If the units are for attendance at another college, or for attendance at the current college for a previous aid year that does not exist on the State Grant Manager System, enter a value of **-1** for the **term code.**
- Save the file as .cvs rather than .xls or .xlsx.
  - The file can contain units values for multiple students.
  - The file can contain units values for several aid years and terms.
  - Each student's units values for one term constitute a separate record within the import file.

Import Student Units

In the excel spread sheet the column term type needs to be completed with either quarter or semester.

Download Example File

Need Help ⑦

	Browse...

Submit   Cancel

- Use the **Browse** button on the page to locate the import units file on the user's system and then click on **Submit** to import the units file.
  - During the import process, a task bar will appear on the page to display progress and eventually indicate whether the file import was successful.
  - A message will appear on the screen for each record in the import file indicating if the record was successfully uploaded or rejected due to errors.

Batch Student Awards

This optional batch function can be used to calculate term awards for all students on the system meeting awarding criteria. Alternatively, the user can calculate awards for individual students using the **Process Grant** function.

collegeadmin
Manage Account   Logout

🏠 HOME

👤 STUDENTS

SEARCH STUDENT
ADD STUDENT
IMPORT STUDENTS ISIR
SUSPENDED ISIRS
SEARCH STATE ISIRS
IMPORT STUDENTS ELIGIBILITY
IMPORT STUDENT UNITS
BATCH STUDENT AWARDS
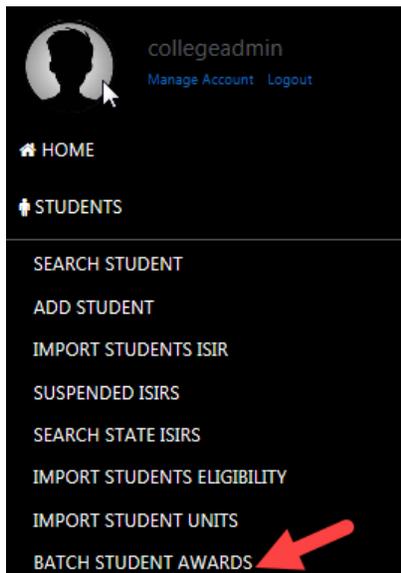
- Awarding criteria are listed below. The term award will not be calculated if any of the criteria are not met. In these cases, an error message will appear on the batch output report which includes the specific criteria not met.

- o A **Units** and **Eligibility** record for the term must exist. (These are created by first calculating an estimated award for the term using either the **Process Grant** function for an individual student or the **Batch Student Awards** process set to estimated awards. The college can also use the **Import Students Eligibility** and **Import Student Units** functions to create eligibility records or manually create individual student records on the **Students Eligibility** and **Students Units** pages.)
- o An ISIR record has been selected and locked for the student.
- o The locked ISIR record was not rejected (e.g., lacked signatures, missing data, etc.) by the federal processor.
- o The student did not indicate on the FAFSA that s/he is graduate/professional student or has a baccalaureate degree.
- o For those students selected for verification, the **Verification Performed** field on the student's ISIR page has been set to **Performed** by the user.
- o For those students with a C Flag problem on their ISIR/SAR, the **C Code Resolved** field on the student's ISIR page has been set to **Resolved**.
- o The student's **Eligibility** record for the term is not marked with any eligibility problems (e.g., state residency, child support hold, satisfactory academic progress, etc.).
- o The student's existing term award is not locked by the user.

- To run the **Batch Student Awards** function:

Batch Student Awards

Need Help ⑦

Aid Year

| 2017-2018 | ⌄ |

Program

| Liberal Arts | ⌄ |

Term

| 2017 Fall | ⌄ |

Origin Type

| Assumptions When EFC Calculated | ⌄ |

Award Type

| Actual |
| Estimate |

Submit   Cancel

- o Click on **Students** on the left menu to open that sub-menu.
- o Click on **Batch Student Awards** on the sub-menu to open that page.
  - ▪ **Aid Year:** Select the aid year for which the term award will be calculated from the drop down box.

- **Program:** Select the program from the drop down box. The **Program** will determine the default credits used to first calculate the term award. (Most colleges will simply have one **Program**. See **Manage Programs** for further information.) After an initial term award has been calculated for the student using default credits, the system will then use the term credits from the student's **Units** record for the term when recalculating an award for that term.
- **Term:** Select the term during the aid year for which the term award should be calculated from the drop down box. The terms shown will be based on those entered by the user on the **Manage Terms** page.
- **Origin Type:** This field is sent on the State Grant DDS record to inform OHE whether or not federal need analysis assumptions were used in the calculation of the student's Expected Family Contribution (EFC). The value reported on the DDS record comes from the value entered for the last term of the aid year for which an award has been calculated. The student's ISIR or Student Aid Report (SAR) will indicate whether assumed values were used in the calculation of the EFC. The value initially displayed in this field comes from the default value selected by the user in the system defaults under **Manage Aid Year**. If the user needs to change the value in this field for an individual student, it must be edited on the **Student Grant** page during the **Process Grant** function or when using the **Batch Student Awards** function.
  - Select a value of **Assumptions When EFC Calculated** if assumptions were used.
  - Select a value of **Don't Use Assumptions When Calculating EFC** if assumptions were not used or were overridden by the financial aid administrator.
- **Award Type:**
  - A value of **Estimate** will:
    - Automatically create and populate an **Eligibility** record for the selected term with values of **FALSE** (no eligibility problems) on the **Student Eligibility** page if one does not already exist;
    - Automatically create and populate a **Units** record for the selected term on the **Student's Units** page based on the estimated credits for the **Program** selected if one does not already exist;
    - Calculate an estimated State Grant award for the student for the term selected. However, an existing actual term award will not be overwritten when using the **Estimate** option.
  - A value of **Actual** will:
    - Calculate an actual State Grant award for the student for the term selected using the credits from the student's existing **Units** record for the term. An existing estimated or actual term award will be overwritten when using the **Actual** option.

Award Disbursement

This optional batch function can be used to post payments and disbursement dates for a term for all students with a term award in cases where the term award amount exceeds the term payment amount

and the term award or payment has not been locked by the user. Alternatively, the user can manually enter individual student term payments and disbursement dates by editing the **Student Awards** page.
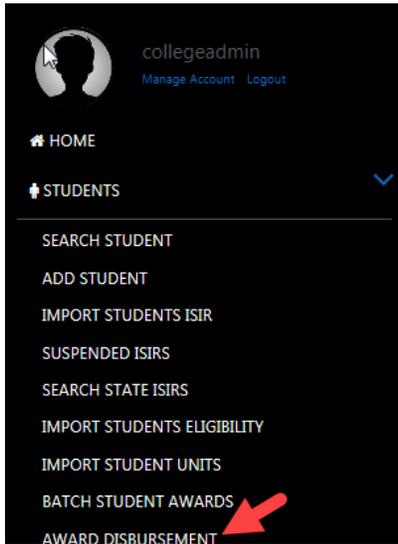
- Click on **Students** on the left main menu to open that sub-menu.
- Click on **Award Disbursement** on the sub-menu to open that page and enter the following fields:
  - **Aid Year:** Select the aid year in which the term takes places from the drop down menu.
  - **Term:** Select the term for which all students with awards will be paid.
  - **Disbursement Date:** Select the disbursement date from the drop down calendar for the field.
  - Click on **Submit** to run the routine.

- Upon completion, an 'Award disbursements have finished processing' message will appear on the page.

Student Data Export

This optional function can be used to download student award and enrollment level data on the system for each student into spreadsheet format for use by the college.
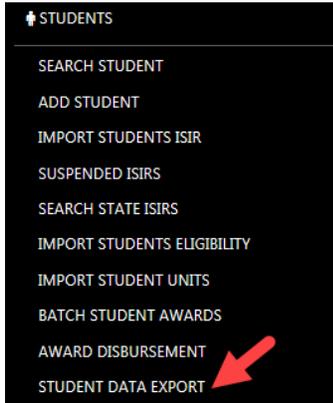
- Click on **Students** on the left main menu to open that sub-menu.
- Click on **Student Data Export** which brings the user to the **Student Grant Downloads** page.
- From the drop down box, select the **Aid Year** for which the user wants to export all student data.
- Click on **Download** to begin the export process and save the export spreadsheet on the user's computer.
- The user can than edit the spreadsheet, e.g., sorting on a particular field, entering formulas, deleting unwanted columns, etc.

StateGrants

#	Id	Alternativ	First Nam	Last Name	Middle Na	AKA	SSN	Birth Date	Address 1	Address 2	City	State	Postal Cod	Term Cod	Term Desc	Fund Cod	Program C	C
1	823		AMY	ABBOT	A		333333333	1/1/1993	1327 MAYFIELD		COON RAI	MN	55444	201710	2017 Fall		Four Year	
2	813		AMY	ABBOT	A		333333333	1/1/1993	1327 MAYFIELD		COON RAI	MN	55444	201701L	2017 Summer Lead		Four Year	
3	832		AMY	ABBOT	A		333333333	1/1/1993	1327 MAYFIELD		COON RAI	MN	55444	201820	2018 Spring		Four Year	
4	836		BEV	BELLCOUR	C		222222222	9/8/1983	99 BETTERWAY		MINNEAP	MN	55444	201820	2018 Spring		Four Year	
5	827		BEV	BELLCOUR	C		222222222	9/8/1983	99 BETTERWAY		MINNEAP	MN	55444	201710	2017 Fall		Four Year	

Account - Setting Up Defaults and Configurations

The financial aid director (or designee) with the role of **College Admin** must set up system defaults and configurations for the college that will later be used by the functions on the State Grant Manager system. This should be performed BEFORE importing any student ISIRs into the system.

Manage College

The **Manage College** function can be used to update the college's name, address and contact information. The **College Code** field should NOT be changed by the user without prior consultation with OHE grant staff.

Developer APIS

For colleges wishing to interface directly with the State Grant Manager system via API, this page can be used by the **College Admin** to enter the college's API information. The college will also need to contact the OHE State Grant Manager to initiate the API process.
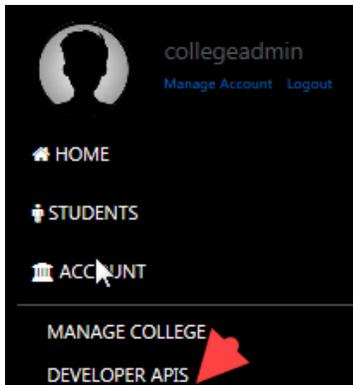
Developer API Actions ▾

Developers API

Need Help ⓘ

Find by Title:

[   ] Search

Title	API Token	API Secret	
Andrew Test	1641683210	zyledEdV90KqDEvhndMFGQ==	Actions ▾
			Edit

Manage Account

The **Manage Account** function can be used to change a user's email address, password, phone number or security question/answer.
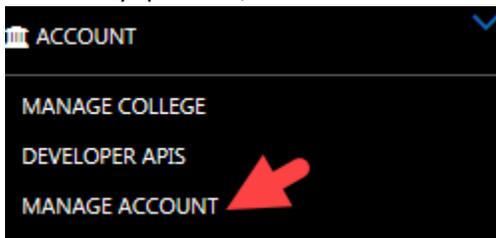
Manage Account
Need Help ⑦
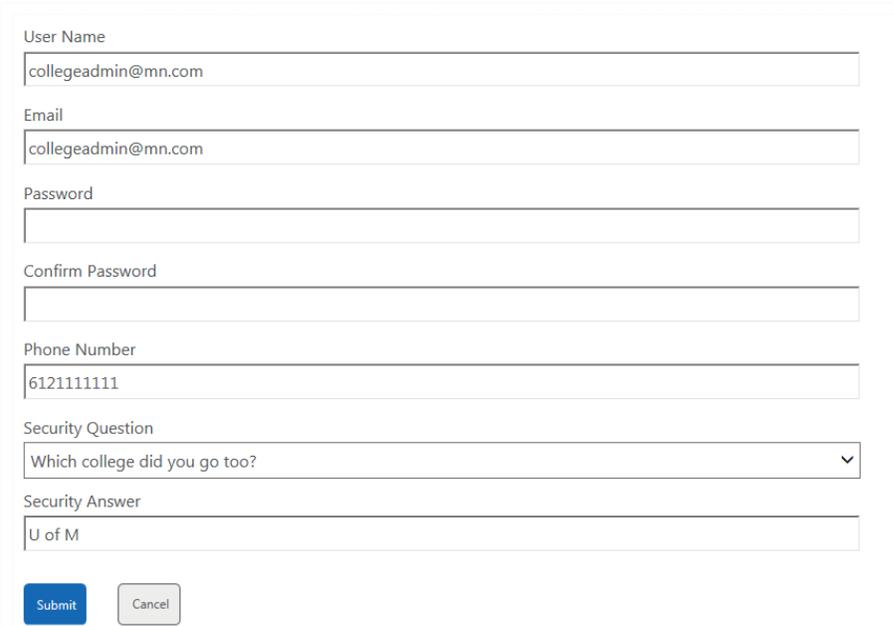
User Name

collegeadmin@mn.com

Email

collegeadmin@mn.com

Password

Confirm Password

Phone Number

6121111111

Security Question

Which college did you go too?

Security Answer

U of M

[Submit] [Cancel]

- Click on **Account** on the left menu to open that sub-menu.
- Click on **Manage Account** from the sub-menu.
- With the exception of the **User Name** field, all other fields can be edited.
  - If not updating the password, enter the current password in the password fields.
  - Note that the user's email address is used as the user's username. Thus, if a user's email address changes, it is best for the **College Admin** for that college to change the user's email address and password using the **Manage Users** function.
- Click on **Submit** to save the changes.

Manage Aid Years

The **Manage Aid Years** function is used to link certain college information and defaults to a particular aid year.

Aid Years

Need Help ⑦

Find by Aid Year:

				Search

Add Aid Year

Aid Year Desc	Aid Year Code	Start Date	End Date	
2016-2017	1617	7/1/2016 12:00:00 AM	6/30/2017 12:00:00 AM	Actions ▾
2017-2018	1718	7/1/2017 12:00:00 AM	6/30/2018 12:00:00 AM	Edit Delete

- Click on **Account** on the left menu to open that sub-menu.
- Click on **Manage Aid Years** from the sub-menu.
- Click on **Add Aid Year** in the **Aid Years Actions** box in the upper right hand corner of the page to add the coming aid year. (The first year the system will be used is the 2018-2019 aid year). Enter information into the following fields:

Aid Years

Need Help ⑦

Find by Aid Year:

Add Aid Year

Aid Year Desc	Aid Year Code	Start Date	End Date	
2016-2017	1617	7/1/2016 12:00:00 AM	6/30/2017 12:00:00 AM	Actions ▾
2017-2018	1718	7/1/2017 12:00:00 AM	6/30/2018 12:00:00 AM	Actions ▾
				Edit Delete

Edit Aid Years

Need Help ⑦

Aid Year Desc

2017-2018

Aid Year Code

1718

Term Type

Semesters ⌄

Default Tuition Cap

Two Year Or Less ⌄

Origin Type

Assumptions When EFC Calculated ⌄

School Type

Clock Hour ⌄

Start Date

7/1/2017 12:00:00 AM

End Date

6/30/2018 12:00:00 AM

Submit   Cancel

- o **Aid Year Desc**: Should be entered as **2018-2019** for that aid year.
- o **Aid Year Code**: Should be entered as **1819** for the 2018-2019 aid year.
- o **Term Type**:
  - ▪ Select a value of **Semesters** if your college uses semesters or trimesters (or two payment periods within a clock hour academic year).
  - ▪ Select a value of **Quarters** if your college uses quarters (or three payment periods within a clock hour academic year).
- o **Default Tuition Cap**
  This field is used to cap the college's actual tuition and fees within the State Grant award calculation based on the type of program in which the student is enrolled.
  - ▪ Select a value of **Two Year or Less** for programs two years or less in duration (e.g., associate's degree, certificate, etc.).
  - ▪ Select a value of **Four Year** for programs four years in duration (e.g., bachelor's degree).
  - ▪ If college offers both types of programs, select the value for the most common type of program, since this field can later be edited on individual student records.
- o **Origin Type**
  This field is sent on the State Grant DDS record to inform OHE whether or not federal need analysis assumptions were used in the calculation of the Expected Family Contribution (EFC). The student's ISIR or Student Aid Report (SAR) will indicate whether assumed values were used in the calculation of the EFC. (This field can be edited on individual student records when calculating a term award for the student using the **Process Grant** or **Batch Student Awards** functions.)
  - ▪ Select a value of **Assumptions When EFC Calculated** if assumptions were used.
  - ▪ Select a value of **Don't Use Assumptions When Calculating EFC** if assumptions were not used or were overridden by the financial aid administrator.
- o **School Type**
  - ▪ Select a value of **Term Based Credit Hour** if your college uses a term-based credit-hour system.
  - ▪ Select a value of **Clock Hour** only if your college uses a payment period clock-hour system to disburse financial aid (e.g., cosmetology school).
- o **Start Date**
  - ▪ From the drop down calendar, select the first day of the aid year you are adding/editing. This should be the start date of the first term in your aid year (typically leading summer term or fall term).
- o **End Date**
  - ▪ From the drop down calendar, enter the last day of the aid year you are adding/editing. This should be the end date of the last term in your aid year (typically spring term or trailing summer term).
- Click on **Submit** to save the information.
- Once an aid year has been created, it can be edited or deleted by clicking on **Edit** or **Delete** in the **Actions** box in the right hand column for that aid year.

Manage Programs

The **Manage Programs** function is used to assign estimated term enrollment credits to students in a particular program. Estimated credits are those used to calculate an estimated award before the student's actual enrollment level is known. Most colleges will simply set up one program and use a value of 15 for estimated credits. Colleges are not required to set up multiple programs, particularly if the programs typically have the same standard enrollment levels.

Colleges with multiple programs with different enrollment levels have the *option* of creating multiple programs to eliminate the need to enter different enrollment levels on individual student records. However, setting up multiple programs will mean the college will need to create a different set of **Terms** and **Term Vars** for each **Program**.
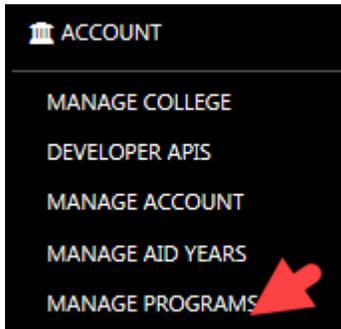
- Click on **Account** on the left menu to open that sub-menu.

- Click on the **Add Programs** button to enter information for a program.
  - **Program Description**
    - Enter the program name. If only one program will be used to cover all programs, the college can enter a generic name such as 'General', 'Liberal Arts', 'Cosmetology,' etc.
  - **Estimated Credits**
    - Enter the estimated term enrollment level for students in that program. Most colleges will use a default value of 15 credits.
- Click on the **Submit** button to save the program information.

Edit Programs

Need Help ⑦
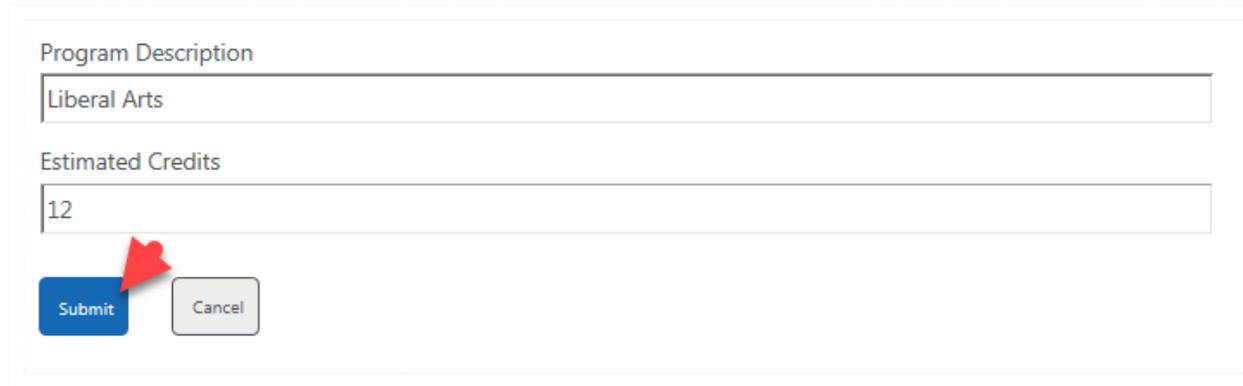
Program Description

Liberal Arts

Estimated Credits

12

[Submit] [Cancel]

- Program information can later be edited from the **Programs** page by clicking on **Edit** on the **Program Actions** drop down box in the upper right hand corner of the page.
  - o Changing **Estimated Credits** for a program after students in that program have already had awards calculated will NOT update the credits and awards on individual student records. (See **Units, Import Student Units**, **Process Grant** and **Batch Student Awards** functions for further guidance on revising credits and awards.)
- Programs can also be deleted from the **Programs** page by clicking on **Delete** on the **Actions** drop down box.

Manage Terms

This function is used to create and assign terms to an aid year. Term information is linked to term award calculation parameters under **Manage Term Vars** and also used when entering student's postsecondary attendance on the **Students Units** page. Most colleges will set up a leading summer term, fall term, winter term (for quarter colleges only), spring term and trailing summer term.

🏛 ACCOUNT

MANAGE COLLEGE

DEVELOPER APIS

MANAGE ACCOUNT

MANAGE AID YEARS

MANAGE PROGRAMS
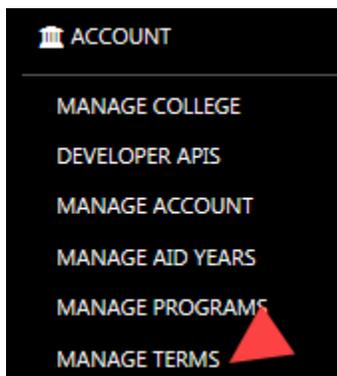
MANAGE TERMS

- Click on **Account** on the left menu to open that sub-menu.
- Click on **Manage Terms** on the sub-menu to open that page.

Terms

Need Help ⑦

Find by Term Description:

	Search

[Add Terms]

Term Description	Aid Years	Term Code	
2016 Fall	2016-2017	201610	Actions ▾
2017 Fall	2017-2018	201710	Actions ▾
			Edit
2017 Spring	2016-2017	201720	Delete
2017 Summer Lead	2017-2018	201701L	Actions ▾
2018 Spring	2017-2018	201820	Actions ▾

- Click on the **Add Terms** button to enter information for the term.
  - o **College Aid Years**
    - From the drop down menu, select the aid year in which the term takes place.
  - o **Term Description**
    - Enter **2018 Summer** for the leading summer term of the 2018-2019 aid year.
    - Enter **2018 Fall** for the fall term of the 2018-2019 aid year.
    - Enter **2019 Winter** for the winter quarter of the 2018-2019 aid year (for colleges on the quarter system only)
    - Enter **2019 Spring** for the spring term of the 2018-2019 aid year.
    - Enter **2019 Summer** for the trailing summer term of the 2018-2019 aid year.
    - **NOTE:** For a summer crossover term (overlaps two aid years), the college will want to enter different term data for each aid year, e.g., **2018 Summer Trail** for trailing summer term of the 2017-2018 aid year and **2018 Summer Lead** for the leading summer term of the 2018-2019 aid year.
  - o **Term Code**
    - Enter a different alpha or numeric code for the term. This will only be used by colleges that directly interface with the State Grant Manager system via API.
  - o **Term Type**
    - Select the type of term from the drop down box (leading summer, fall, winter, spring and trailing summer)
  - o **Start Date**
    - From the drop down calendar, select the first day of the term you are adding/editing.
  - o **End Date**
    - From the drop down calendar, enter the last day of the term you are adding/editing.
  - o **NOTE:** Colleges with multiple term/payment period start/end dates will need to create and add information for multiple terms.
    - **For example:**
      - **2018 Fall** for 2018-2019 fall term starting August 30 and ending December 15.
      - **2018 Fall Late** for 2018-2019 fall term starting September 15 and ending December 31

Edit Terms

Need Help ⑦
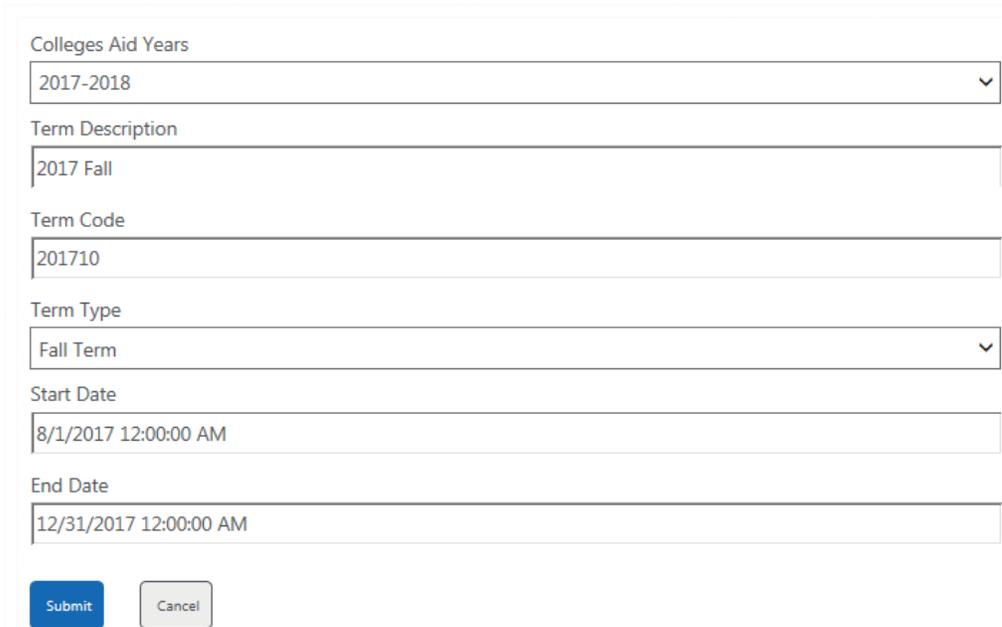
Colleges Aid Years

2017-2018	⌄

Term Description

2017 Fall

Term Code

201710

Term Type

Fall Term	⌄

Start Date

8/1/2017 12:00:00 AM

End Date

12/31/2017 12:00:00 AM

[Submit] [Cancel]

- Once a term exists, the user can edit or delete the term by clicking on **Edit** or **Delete** in the **Actions** box in the right hand column of the **Manage Terms** page.

Manage Term Vars

The **Manage Term Vars** function is used to link State Grant award calculation parameters, tuition and fees and State Grant application cutoff dates to each term created by the college under **Manage Terms**. Fields on the top section of this page are populated by the user. Fields under the **State Level Funding Vars** section of the page are populated by OHE and selected by the college from the drop down for the **State Level Vars** field.

🏛 **ACCOUNT**

MANAGE COLLEGE

DEVELOPER APIS

MANAGE ACCOUNT

MANAGE AID YEARS

MANAGE PROGRAMS

MANAGE TERMS
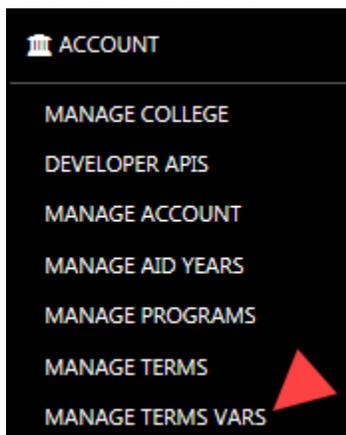
MANAGE TERMS VARS

- Click on **Account** on the left menu to open that sub-menu.
- Click on **Manage Term Vars** on the sub-menu to open the **College Term Vars** page.

College Term Vars

Need Help ⑦

Find by Term:

[   ] [Search]

[Add Term Variables]

Term	Program	Cut Off Date	Start Date	End Date	
2016 Fall	Liberal Arts	10/5/2017 12:00:00 AM	1/1/2016 12:00:00 AM	12/31/2016 12:00:00 AM	Actions ▼
2017 Fall	Liberal Arts	9/30/2017 12:00:00 AM	5/22/2017 12:00:00 AM	11/1/2018 12:00:00 AM	Actions ▼
2017 Summer Lead	Liberal Arts	7/31/2017 12:00:00 AM	5/22/2017 12:00:00 AM	11/1/2018 12:00:00 AM	Edit / Delete
2018 Spring	Liberal Arts	1/31/2018 12:00:00 AM	5/22/2017 12:00:00 AM	11/1/2018 12:00:00 AM	Actions ▼

- Click on the **Add Term Variables** button to enter information for the term. Entering data on the **Add Term Variables** page must be done separately for each term created by the user on the **Manage Terms** page.
  - o **College Term**
    - ▪ From the drop down box, select the term to which the term variables should be linked. The terms displayed will be those created by the user under **Manage Terms.**
  - o **College Program**
    - ▪ From the drop down box, select the name of the program that should be linked to the term. Because a term can only be linked to one program, colleges with multiple programs created under **Manage Programs** will need to set up a set of terms and term variables for *each program*.
  - o **State Level Vars**
    - ▪ From the drop down box, select the **State Level Vars** set up for the aid year by OHE. Typically, OHE will create two sets of **State Level Vars** each aid year: estimated and final. However, if award parameters change during the aid year, there may be additional **State Level Vars** from which to choose.
  - o **Tuition per Credit** (displayed only for term-based credit-hour colleges)
    - ▪ If the college charges tuition on a per-credit basis with no banding, the college would enter the per-credit tuition amount. Include cents. If the college bands tuition for a range of credits (e.g., 12 - 18 credits, 12+ credits, etc.), the college would enter the result of the amount of tuition charged to a student taking 15 credits divided by 15 credits. Thus, if a tuition band for 12 - 18 credits were $16,000, the college would enter $1066.67 ($16,000 divided by 15 rounded to nearest cent).
    - ▪ **NOTE:** The same value should be entered for all terms of the aid year.
  - o **Fees per Credit** (displayed only for term-based credit-hour colleges)
    - ▪ Only general fees charged to all students can be used in the State Grant award calculation. Do NOT include program or course-specific fees or fees for the purchase of equipment. If the college charges general fees on a per-credit basis with no banding, the college would enter the per-credit general fee amount. If the college bands general fees for a range of credits (e.g., 12-18 credits, 12+ credits, etc.), the college would enter the result of the amount of general fees charged to a student taking 15 credits divided by 15 credits, rounded to the nearest cent.
    - ▪ **NOTE:** The same value should be entered for all terms of the aid year.

Edit College Term Vars

Need Help ⑦   Term-Based Credit-Hour College

College Term

| 2017 Fall | ⌄ |

College Program

| Liberal Arts | ⌄ |

State Level Vars

| 2017-2018 Funding Variables | ⌄ |

Tuition Per Credit

| 125.25 |

Fees Per Credit

| 15.00 |

Cut Off Date (30th Day of Term)

| 9/30/2017 12:00:00 AM |

- o **Hours in Academic Year** (displayed only for clock hour colleges)
  - ▪ Enter the number of hours in the clock-hour college's full-time academic year as a round number. Each clock-hour college defines its full-time academic year as a number of clock hours, with a minimum academic year of 900 clock hours. The academic year clock hours do not always match the number of clock hours in each program the college offers. For example, a college may use an academic year of 900 hours, with students in a 1,550 cosmetology program taking more than one academic year to complete their program.
  - ▪ **NOTE:** The same value should be entered for all terms of the aid year.
- o **Remaining Program Hours** (displayed only for clock hour colleges)
  - ▪ This feature can be used to prorate State Grant payment period awards when the number of clock hours remaining in the student's program are less than the number of clock hours in the student's payment period. For example, if a student has 150 hours remaining in the program but there are 450 hours in the clock hour payment period, entering 150 hours in this field will cause the student's State Grant award for this term/payment period to be prorated by 150/450 or .333. Entering a default value is not recommended, since student payment periods and program hours differ and typically need to be updated on individual student records when calculating the term award using the **Process Grant** screen. If using this default, enter a whole number.
- o **Weighted Tuition and Fees for Academic Year** (displayed only for clock hour colleges)
  - ▪ This figure is derived from costs reported to OHE each year on the annual online State Grant budget questionnaire. After the college submits its annual budget questionnaire, it will receive an email from OHE with this calculated figure, which represents the total weighted hourly cost for all clock-hour programs multiplied by

the number of hours in the college's academic year. That figure should be entered in this field.

- **NOTE:** The same value should be entered for all terms of the aid year.

Edit College Term Vars

Need Help ⓘ   **Clock Hour School**

College Term

2017 Fall

College Program

Liberal Arts

State Level Vars

2017-2018 Funding Variables

Hours In Academic Year

1500

Remaining Program Hours

0

Weighted Tuition And Fees For Academic Year

8808

Cut Off Date (30th Day of Term)

9/30/2017 12:00:00 AM

Example for fictional college with 1,200 hour academic year:
- Cosmetology program tuition and general fees = $10,000 divided by 1,550 program hours = $6.45 per hour x 80% of students enrolled in this program = $5.16 weighted hourly cost for program.
- Esthiology program tuition and general fees = $7,000 divided by 600 program hours = $11.67 per hour x 15% of students enrolled in this program = $1.75 weighted hourly cost for program.
- Manicuring program tuition and general fees = $3,000 divided by 350 program hours = $8.57 per hour x 5% of students enrolled in this program = $ .43 weighted hourly cost for program.
- $5.16 + $1.75 + $.43 = $7.34 total weighted hourly cost for all programs x 1,200 hours in college's full-time academic year = $8,808 weighted tuition and general fees for full-time academic year.
- **Cut Off Date (30ᵗʰ Day of Term)**
  - Select the 30th day of the term from the drop-down calendar. To arrive at this figure, count the first day of the term as day one and count to 30, including all

calendar days. This is the application deadline by which the FAFSA must be received at the federal processor in order for the student to receive a State Grant for the term.

STATE LEVEL FUNDING VARIABLES (populated by OHE and cannot be edited by the user)

- **Parent Contribution %**
  - Percentage used to prorate the federal 9-month Parent Contribution prior to its subtraction within the State Grant award calculation for dependent students. Initialized by OHE each aid year. Allows for two decimal places. Does not change during the aid year. For the 2017-2018 aid year, this percentage was 84 percent, such that a $1,000 annual federal parent contribution was prorated to $840 prior to subtraction within the State Grant award calculation.

- **Student Share %**
  - The percentage of the State Grant award calculation budget assigned to the student. Initialized by OHE each aid year. Allows for two decimal places. This value was 50 percent for the 2017-2018 aid year. Can later be increased by OHE for term(s) during the aid year when a State Grant program funding shortfall is projected.

- **Independent With Dependents Contribution %**
  - Percentage used to prorate the federal 9-month EFC prior to its subtraction within the State Grant award calculation for independent students with dependents other than a spouse. Initialized by OHE each aid year. Allows for two decimal places. This value was 76 percent for the 2017-2018 aid year. Does not change during the aid year.

- **Independent Without Dependents Contribution %**
  - Percentage used to prorate the federal 9-month EFC prior to its subtraction within the State Grant award calculation for independent students without dependents other than a spouse. Initialized by OHE each aid year. Allows for two decimal places. This value was 40 percent for the 2017-2018 aid year. Does not change during the aid year.

- **Maximum Units – Quarter**
  - Units of postsecondary attendance cutoff for students attending a college on the quarter system. Students with units greater than the cutoff are no longer eligible for a State Grant. Initialized by OHE each aid year. Allows for two decimal places. Currently set at **94.40** units. Does not change during the aid year.

- **Maximum Units – Semester**
  - Units of postsecondary attendance cutoff for students attending a college on the semester system. Students with units greater than the cutoff are no longer eligible for a State Grant. Initialized by OHE each aid year. Allows for two decimal places. Currently set at **93.60** units. Does not change during the aid year.

- **State Contribution Surcharge %**
  - Percentage used to increase the prorated EFC or Parent Contribution, as directed by OHE, in cases when State Grant awards must be reduced due to a projected State Grant program funding shortfall. Initialized by OHE each aid year. Allows for two decimal places. For example, if the State Contribution Surcharge were 10 percent, a

federal Parent Contribution of $1,000 would first be prorated by the parent contribution percentage for that aid year (e.g., for the 2017-2018 aid year, $1,000 x .84 = $840) and then increased by 10 percent (e.g. $840 x 1.10 = $924).

- o **State Contribution Deduction** (this field should be $0 for the 2017-2018 aid year, since it is not in use and was built into the system for possible future use)
    - Dollar amount used to decrease the prorated EFC or Parent Contribution within the State Grant award calculation. Initialized as $0 for all terms. No cents. If the result after the deduction is less than $0, it is set to $0. For example, if the 9-month annual federal Parent Contribution were $500, and the deduction were $600, the Parent Contribution would be prorated by 94 percent to $470. The deduction of $600 from $470 would be -$130, which would be set to $0. Does not change during the aid year.
- o **LME**
    - The uniform annual living and miscellaneous expense (LME) added to the lesser of the actual or capped tuition and fees to arrive at the annual State Grant award calculation budget.
- o **Four Year Cap**
    - Dollar amount of annual tuition and fee cap used within the State Grant award calculation for students in four-year degree programs. Students in four year programs attending colleges with tuition and fees in excess of the cap have the cap amount used to calculate the State Grant award. This amount is based on the highest tuition and fees charged by a four-year public college or university in Minnesota. Initialized by OHE each aid year. Does not change during the aid year.
- o **Two Year Cap**
    - Dollar amount of tuition and fee cap used within the State Grant award calculation for students in programs of two-years or less in duration. Students in programs of two years or less in duration attending colleges with tuition and fees in excess of the cap have the cap amount used to calculate the State Grant award. This amount is based on the highest tuition and fees charged by a two-year public college in Minnesota. Initialized by OHE each aid year. Does not change during the aid year.
- o **Start Date**
    - Start date for the award calculation parameters initialized by OHE each aid year.
- o **End Date**
    - End date for the award calculation parameters initialized by OHE each aid year.

- Once **Term Vars** have been created, they can be edited or deleted by clicking on **Edit** or **Delete** in the **Actions** box in the right hand column on the **Manage Term Vars** page.

Manage Users
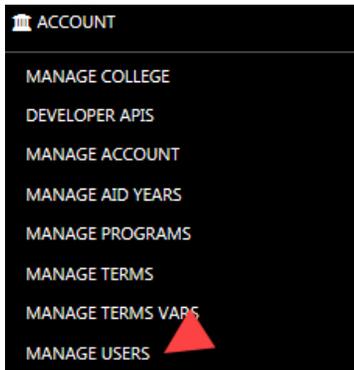
This page can be used by the financial aid director (**CollegeAdmin** role) to add, delete and edit users on the State Grant Manager system.

- Once logged into the system, click on **Account** on the left menu to open that sub-menu.
- Click on **Manage Users.**

- To add a user, select **Add Users** from the **User Actions** drop down box in the upper right hand corner of the page and enter the additional user's **email** address (will serve as username)**, Phone Number** and **College ID** (user-created code that can be used to identify staff).

Add User

Need Help ⑦

Email
_____

Password
_____

Confirm Password
_____

Phone Number (Enter all digits with no dashes)
_____

College Id
18

Role
Financial Adviser ▾

Security Question
What is your mother's maiden name? ▾

Security Answer
_____

[Submit] [Cancel]

- Create a **Password** for the user which is at least 8-characters in length and includes at least 1 uppercase letter, 1 lower case letter, 1 number and 1 special symbol.
- Select the appropriate **Role** for the user.
  - The role of **College Admin** should be reserved for the financial aid director or top State Grant administrator(s) within the financial aid office.
  - The role of **Financial Advisor** should be used for non-managerial staff and student workers in the financial aid office. This role will allow the user to:
    - View and edit student records for students with ISIR records listing the college's FAFSA code.
    - Search for student ISIRs on OHE's ISIR database and import individual ISIRs into the State Grant Manager database (for colleges not participating in federal financial aid programs).
- Click on **Submit** to save the entry.
- Information for existing users can be edited or deleted by clicking on **Edit** or **Delete** in the **Actions** box in the right hand column for that user.

Manage Users

Need Help ⑦

Find by User Name:

_____ [Search]

Email Address	Phone Number	
collegeadmin@mn.com	6122054821	Actions ▾
		Edit
financial@mn.com		Delete
jholland@bethel.edu	612-850-2400	Actions ▾
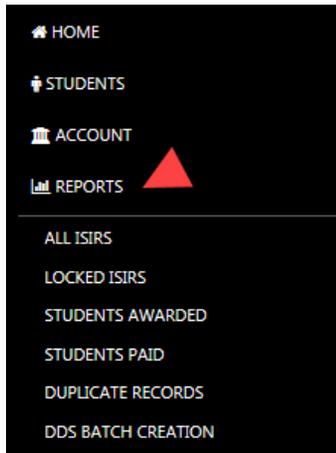
Reports

- Click on **Account** on the left menu to open that sub-menu.
- Click on **Reports** on the sub-menu to open that page.
- To generate a report, click on **View Report** from any of the available report options appearing on the screen.
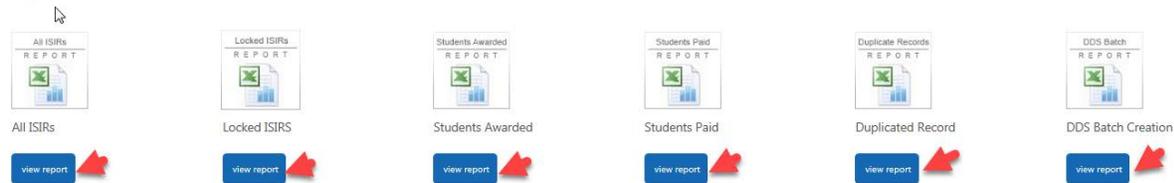
- On the individual report page, click on the blue **Download** button to produce the report and then on the blue **Download Report** button to view or save the spreadsheet report.
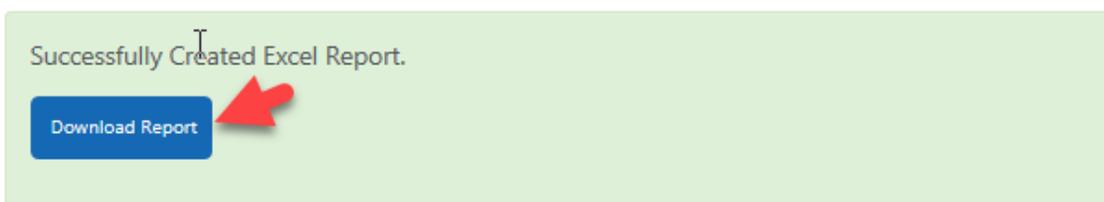
All ISIRs

- This report will display the following information for all ISIR records in the State Grant Manager database, including multiple ISIRs for the same student:

AllISIRS

#	Id	Student Id	Student L	Student F	Student M	Student A	D Student S	FAFSA Ap	ISIR Trans	ISIR Trans	ISIR Trans	Position o	Dependenc	Formula T	Federal EI	Federal Pi	State Gra
523	548							7/10/2017	7/11/2017	1		N/A	Independ	Simplified	0	0	0
536	561							7/10/2017	7/11/2017	2		N/A	Independ	Simplified	0	0	0
549	574							7/10/2017	7/11/2017	3		N/A	Independ	Simplified	0	0	0
581	606							7/10/2017	7/11/2017	4		N/A	Independ	Simplified	0	0	0
147	168							1/4/2017	6/22/2017	4	4	N/A	Depender	Simplified	0	0	1419
287	310							1/4/2017	6/22/2017	4		N/A	Depender	Simplified	0	0	0
447	471							1/4/2017	6/22/2017	4		First Posit	Depender	Simplified	0	0	0
516	540							7/11/2017	7/11/2017	1		N/A	Dependent	Rejected	0	0	0
528	553							7/11/2017	7/11/2017	2		N/A	Dependent	Rejected	0	0	0
541	566							7/11/2017	7/11/2017	3		N/A	Dependent	Rejected	0	0	0
573	598							7/11/2017	7/11/2017	5	5	N/A	Dependent	Rejected	0	0	0
22	41							6/21/2017	6/22/2017	1		N/A	Depender	Simplified	0	0	1670

- **#:** The student's sequence number on the report, e.g., first student is 1.
- **ID:** ID number assigned to the student by the system when ISIR record is loaded.
- **Student ID:** Optional field to store the student's college ID, as entered by the college using the **Edit Student** function on the **Student Details** page).
- **Student last name**
- **Student first name**
- **Student middle initial**
- **Student AKA** (any alternate student name as entered by the college using the **Edit Student** function on the **Student Details** page).
- **Student DOB**
- **Student SSN**
- **FAFSA application receipt date**
- **ISIR transaction processed date**
- **ISIR transaction number**
- **ISIR transaction number locked:** Displays the ISIR transaction number, if locked.
- **Position of college code in ISIR:** Displays the position of the user's college code in the 10 college code fields on the ISIR record.
- **Dependency status**: (Dependent, Independent w/o Dependents, Independent with Dependents, Dependent Rejected, Independent Rejected).
- **Formula type:** Displays which need analysis formula type was used to calculate the EFC.
  - Full Needs Test Dependent
  - Full Needs Test Independent without Dependents
  - Full Needs Test Independent with Dependents
  - Simplified Needs Test Dependent
  - Simplified Needs Test Independent w/o Dependents
  - Simplified Needs Test Independent with Dependents
- **Federal EFC**: 9-month annual Federal Expected Family Contribution.
- **Federal Parent Contribution** : 9-month annual Federal Parent Contribution.
- **State Grant Award**: Displays the sum of State Grant awards for every term during the aid year.

- The **Locked ISIRs** report will print the following information for all locked ISIR records in the State Grant Manager database:

#	Id	Student Id	Student L	Student F	Student M	Student A	Student D	Student S	FAFSA Ap	ISIR Trans	ISIR Trans	ISIR Trans	Verificatic	Verificatic	ISIR Rejec	C Code Fla	C Code Re	Chi
34	168								1/4/2017	6/22/2017	4	4	N					
50	598								7/11/2017	7/11/2017	5	5	N			2 1 10159		
38	183								6/21/2017	6/22/2017	1	1	N					
3	17	0							6/15/2017	6/22/2017	2	2	N				Y	
22	121								6/21/2017	6/22/2017	1	1	N					
44	417								6/21/2017	6/22/2017	1	1	Y				Y	
11	45								6/21/2017	6/22/2017	1	1	N					
43	358								11/15/201	6/22/2017	2	2	Y					
52	610								7/10/2017	7/11/2017	5	5	N			1516		
49	544								7/9/2017	7/11/2017	1	1	Y					

- o **#:** The student's sequence number on the report, e.g., first student is 1.
- o **ID:** ID number assigned to the student by the system when ISIR record is loaded.
- o **Student ID:** Optional field to store the student's college ID, as entered by the college using the **Edit Student** function on the **Student Details** page).
- o **Student last name**
- o **Student first name**
- o **Student middle initial**
- o **Student AKA** (any alternate student name as entered by the college using the **Edit Student** function on the **Student Details** page)
- o **Student DOB**
- o **Student SSN**
- o **FAFSA application receipt date**
- o **ISIR transaction processed date**
- o **ISIR transaction number**
- o **ISIR transaction number locked:** Displays the ISIR transaction number, if locked.
- o **Verification flag**: **Y** if federal system selected ISIR for verification. Otherwise, **N**.
- o **Verification performed:**
  - **Not Required:** Displayed when student's ISIR was not selected for verification.
  - **Required:** Displayed when student's ISIR was selected for verification but the college has not yet performed verification.
  - **Performed:** Displayed when student's ISIR was selected for verification and the college has performed verification.
- o **ISIR Reject Code(s)**: (see Federal Reject Codes in U.S. Department of Education's ISIR Guide at: https://ifap.ed.gov/ifap/publications.jsp).
- o **C code flag** (**Y** = if student's ISIR contained a C code. Otherwise, **N**.)
- o **C code resolved:**
  - **Not Required:** Displayed when student's ISIR does not contain a C code.
  - **Required:** Displayed when student's ISIR contains a C code, but the college has not yet resolved the problem.
  - **Resolved:** Displayed when student's ISIR was contains a C code and the college has resolved the problem.
- o **Child Support Hold Date**: Displays the first day of the term for which the student placed on hold, as entered by college on the **Students Eligibility** page.

- o **SELF Loan Default Hold Date**: Displays the first day of the term for which the student placed on hold, as entered by college on the **Students Eligibility** page.
- o **Total Units:** Total units of postsecondary attendance entered on the system.
- o **Meets SG Eligibility Requirements: TRUE**=college has determined student meets all requirements for the most recent term of the aid year; **FALSE**=not yet determined or does not meet all eligibility requirements for the most recent term of the aid year.
- o **SAP Hold Date:** Displays the first day of the term for which the student has a SAP hold as entered by college on the Students Eligibility page.
- o **Dependency Status**: Displays the dependency status on the student's locked ISIR:
  - ▪ Dependent, Independent w/o Dependents, Independent with Dependents, Dependent Rejected, Independent Rejected.
- o **Formula type:** Displays the need analysis formula type used to calculate the EFC:
  - ▪ Full Needs Test Dependent
  - ▪ Full Needs Test Independent without Dependents
  - ▪ Full Needs Test Independent with Dependents
  - ▪ Simplified Needs Test Dependent
  - ▪ Simplified Needs Test Independent w/o Dependents
  - ▪ Simplified Needs Test Independent with Dependents
- o **Federal EFC**: 9-month annual Federal Expected Family Contribution.
- o **Federal Parent Contribution** : 9-month annual Federal Parent Contribution.
- o **State Grant Award**: Displays the sum of State Grant awards for every term during the aid year.

Students Awarded

- The **Students Awarded** report displays term enrollment, tuition cap, award and payment data for any student with a State Grant award for any term during the aid year. The following fields are displayed on the report:

StudentAwards

#	Student L	Student F	Student M	SSN	Leading Su	Leading Sum	Leading Sum	Leading Su	Leading Su	Leading Su	Fall Term Credits	Fall Term	Fall Term	Fall Term	Fall Term	Fall Term
28					15	Four Year	898	898	0	898	14	Two Year	521	521	0	521
8					15	Four Year	898	898	0	898	0		0	0	0	0
5					0		0	0	0	0	0		0	0	0	0
19					15	Four Year	898	898	0	898	15	Two Year	772	772	0	772
18					15	Four Year	898	898	0	898	15	Two Year	772	772	0	772
15					15	Four Year	898	898	0	898	0		0	0	0	0
10					15	Four Year	3286	3286	0	3286	15	Two Year	3159	3159	0	3159
1					0		0	0	0	0	0		0	0	0	0
7					15	Four Year	2538	2538	0	2538	15	Two Year	2411	2411	0	2411

- o **#:** The student's sequence number on the report, e.g., first student is 1.
- o **Student Last Name**
- o **Student First Name**
- o **Student Middle Initial**
- o **SSN**
- o **Leading Summer Term Credits**
- o **Leading Summer Term Award**

- o **Leading Summer Term Tuition and Fee Cap**
- o **Leading Summer Term Paid**
- o **Leading Summer Term Refunded**
- o **Leading Summer Term Net Paid (Paid minus Refunded)**
- o **Fall Term Credits**
- o **Fall Term Award**
- o **Fall Term Tuition and Fee Cap**
- o **Fall Term Paid**
- o **Fall Term Refunded**
- o **Fall Term Net Paid (Paid minus Refunded)**
- o **Winter Quarter Term Credits**
- o **Winter Quarter Term Award**
- o **Winter Quarter Term Tuition and Fee Cap**
- o **Winter Quarter Term Paid**
- o **Winter Quarter Term Refunded**
- o **Winter Quarter Term Net Paid (Paid minus Refunded)**
- o **Spring Term Credits**
- o **Spring Term Award**
- o **Spring Term Tuition and Fee Cap**
- o **Spring Term Paid**
- o **Spring Term Refunded**
- o **Spring Term Net Paid (Paid minus Refunded)**
- o **Trailing Summer Term Credits**
- o **Trailing Summer Term Award**
- o **Trailing Summer Term Tuition and Fee Cap**
- o **Trailing Summer Term Paid**
- o **Trailing Summer Term Refunded**
- o **Trailing Summer Term Net Paid (Paid minus Refunded)**

Students Paid

PaidStudents

#	Student La	Student Fi	Student M	SSN	Leading Su	Leading Su	Leading Su	Leading Su	Leading Su	Leading Su	Fall Term	Fall Term	Fall Term	Fall Term	Fall Term	Fall Term	Winter Qu	W
1					15	Four Year	1274	0	0	0	15	Four Year	1274	1274	0	1274	0	
2							1274	0	0	0			1274	1274	0	1274		

- The **Students Paid** report displays term enrollment, tuition cap, award and payment data for any student with a State Grant net payment (payment minus refund) for any term during the aid year. The following fields are displayed on the report:
  - o **#:** The student's sequence number on the report, e.g., first student is 1.
  - o **Student Last Name**
  - o **Student First Name**
  - o **Student Middle Initial**
  - o **SSN**

- o **Leading Summer Term Credits**
- o **Leading Summer Term Award**
- o **Leading Summer Term Tuition and Fee Cap**
- o **Leading Summer Term Paid**
- o **Leading Summer Term Refunded**
- o **Leading Summer Term Net Paid (Paid minus Refunded)**
- o **Fall Term Credits**
- o **Fall Term Award**
- o **Fall Term Tuition and Fee Cap**
- o **Fall Term Paid**
- o **Fall Term Refunded**
- o **Fall Term Net Paid (Paid minus Refunded)**
- o **Winter Quarter Term Credits**
- o **Winter Quarter Term Award**
- o **Winter Quarter Term Tuition and Fee Cap**
- o **Winter Quarter Term Paid**
- o **Winter Quarter Term Refunded**
- o **Winter Quarter Term Net Paid (Paid minus Refunded)**
- o **Spring Term Credits**
- o **Spring Term Award**
- o **Spring Term Tuition and Fee Cap**
- o **Spring Term Paid**
- o **Spring Term Refunded**
- o **Spring Term Net Paid (Paid minus Refunded)**
- o **Trailing Summer Term Credits**
- o **Trailing Summer Term Award**
- o **Trailing Summer Term Tuition and Fee Cap**
- o **Trailing Summer Term Paid**
- o **Trailing Summer Term Refunded**
- o **Trailing Summer Term Net Paid (Paid minus Refunded)**

Duplicate Records

DuplicateReport

#	Id	Alternativ	First Name	Last Name	Middle Na	SSN	Birth Date	Transaction Processed	Transaction Number
1	24		BILL	LARSON		111223333	6/15/1992 0:00	6/21/2017 12:00:00 AM	1
2	25		JACKSON	BURRELL		111223333	6/15/1992 0:00	6/21/2017 12:00:00 AM	1
3	25		BONNIE	TYLER		222334444	7/15/1997 0:00	6/21/2017 12:00:00 AM	1
4	26		BONNIE	TYLER		333445555	7/15/1997 0:00	6/21/2017 12:00:00 AM	2

- The **Duplicate Records** report will display information about students when:
  - o A SSN in use by more than one student (name or date of birth on each record don't match name or date of birth on the other record(s) under the same SSN).
  - o One student appears under multiple SSNs.
- The report output displays the following information:
  - o **#:** The student's sequence number on the report, e.g., first student is 1.

67

- o **ID:**
- o **Alternative ID:**
- o **First Name**
- o **Last Name**
- o **Middle Initial**
- o **SSN**
- o **Birth Date**
- o **Transaction Processed Date** (ISIR)
- o **Transaction Number** (ISIR)
- o

DDS Batch Creation

- Colleges use this function to create a State Grant DDS batch for submission to OHE for processing. A student's record is included in a DDS batch if:
  - o Term credits > 0 for any term and the **Award Calculated** date is not blank OR a term award > $0 for any term.
- The college enters the following fields after clicking on **DDS Batch Creation** to bring up the **DDS Report** page:
  - o **Aid Year**: Select the aid year from the drop down box for which the DDS batch is being created.
  - o **Batch cutoff date:** Will be automatically populated with the date the batch is created. The user has the option of selecting another date from the drop down calendar for the field.
  - o **File Name:** This field will be automatically populated with the DDS batch file name required by OHE (e.g., DDS19_XXXXXX.AWD, with 19 representing 18-19 aid year and XXXXXX representing 6-digit college code from the **Manage College** page).
  - o **Institution Balance:** The user populates this field with the amount of State Grant funds remaining on campus. Can be a negative figure (e.g., -4500) in cases when the college has disbursed State Grants from institutional funds and requires reimbursement from OHE. No cents.
- Click on the **Create DDS Batch** button to create the DDS batch.

DDS Report

Need Help ⑦

Aid Year

| 2017-2018 |

Batch Cutoff Date

| 9/13/2017 12:37:56 PM |

File Name

| DDS18_002338_1746701740.AWD |

Institution Balance

| 9356 |

[Create DDS Batch] [Cancel]

- The user will see a task bar appear on the page while the DDS batch is being generated. After the task bar is completed, the **DDS Report** page will contain a message '**Successfully Created DDS Batch.**'
- To download the DDS batch to the user's computer, the user clicks on the **Download DDS Report button** at the top of the **DDS Report** page and then saves that file to his/her computer.
  - The user can then upload the DDS batch on OHE's secure web site used for uploading DDS batches or submit the file to OHE using Secure File Transfer Protocol (SFTP).
- The user has the option of saving a spreadsheet file of the students included in the DDS batch which contains student identifiers along with credits, awards, payments and refunds for each term. To download the spreadsheet file, the user clicks on **Download Audit Report** at the top of the **DDS Report** page.

DDS Report

This is DDS batch that should be saved and then uploaded to OHE

Successfully Created DDS Batch.

Download DDS Report   Download Audit Report

Need Help ⓘ

This is audit report of students sent in DDS batch for college's records

Aid Year

2017-2018

Batch Cutoff Date

9/13/2017 2:08:33 PM

File Name

DDS18_002338_1746718817.AWD

Institution Balance

0

Create DDS Batch   Cancel

ADDITIONAL OHE SUPER ADMIN FUNCTIONS

Colleges Function

Search Colleges
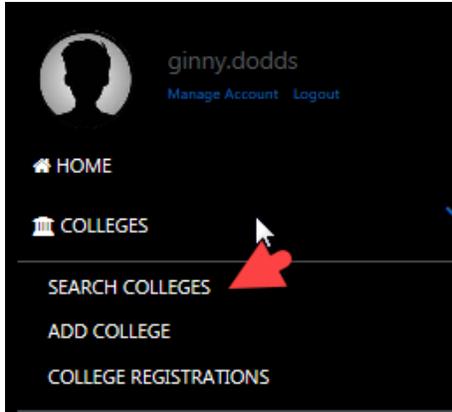
- The **Search Colleges** page can be used by **Admin** and **Super Admin** roles (typically OHE Grant staff and Grant Manager) to see which colleges are currently in the State Grant Manager database. Colleges appear in the database after they complete the registration process and are approved by OHE Grant staff on the **College Registrations** page.
- To search for a college:
  - Click on **Colleges** on the left side bar menu to open up the sub-menu.
  - Click on **Search Colleges.**
  - Either scroll down to search for college or enter all or part of the college's name in the **Find by Name** box at the top of the page and click on **Search**.
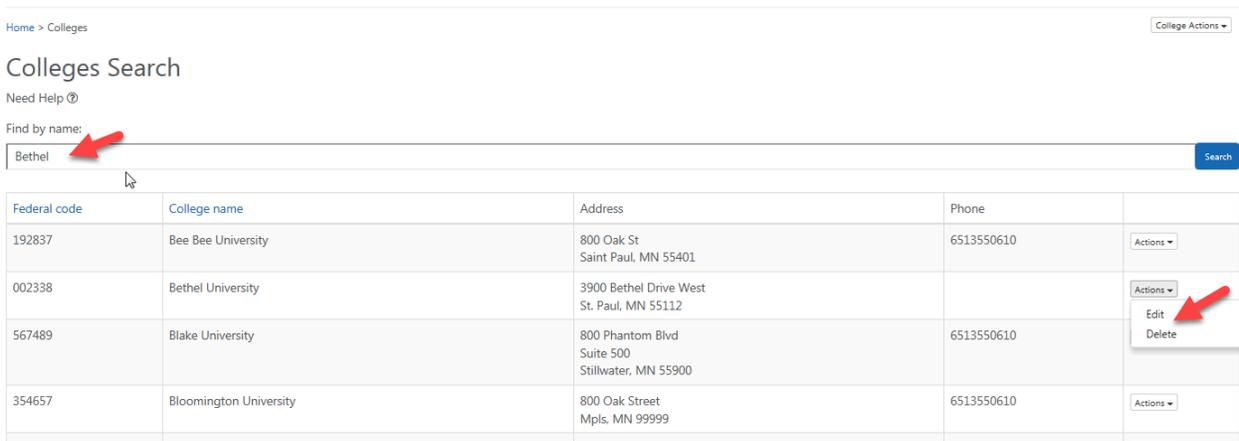
- Once found, to edit or delete a college from the system, click on **Edit** or **Delete** in the **Actions** box in the right hand column for that college to open up the **Edit College** or **Delete College** page.

Edit College

Need Help ⑦

College Name

Bloomington University

College Code

354657

Address 1

800 Oak Street

Address 2

City

Mpls

State

MN

Postal Code

99999

Contact

Ginny

Email

ginidodds@hotmail.com

Phone (XXX-XXX-XXXX)

6513550610

Allow to Search State ISIR

☑

This box is checked for colleges not participating
in federal financial aid programs

[Submit] [Cancel]

- o The **Allow to Search State ISIR** field at the bottom of the **Edit College** page should be checked by OHE staff during registration approval ONLY for colleges that do NOT participate in federal financial aid programs. These colleges will be using the **Search State ISIR** function on the system to search for and import ISIRs from OHE's ISIR database rather than importing their own ISIR files.
- o The **Edit College** page can also be used to update information about the college, such as name, address, and contact information.
- o The **Delete College** page should not be used to delete colleges that already have student records in the State Grant Manager database.

Add College

- It is unlikely this function will be needed, as colleges are automatically added to the system after they register and are approved by OHE staff.

College Registrations
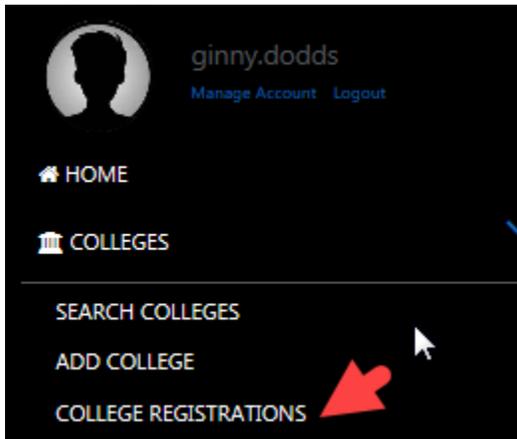
- This function is used by OHE staff with **Admin** or **Super Admin** roles to approve or deny a college financial aid director (or main State Grant administrator) who register under the role of **College Admin** to request access to the State Grant Manager system.
- The OHE **Super Admin** should check the system periodically for new registrations. To review and approve or deny the pending registration, the **Super Admin** would:
  - Click on **Colleges** on the left side bar menu to open up the sub-menu.
  - Click on **College Registrations**.

  - By default, the **Manage College Sign Up** page will show all college financial aid administrators who have registered and are pending approval by OHE.
  - Click on the **Actions** box in the right hand column for the college and then **View/Approve**.
  - Review the information provided by the college on the next **Manage College Sign Up** page and make sure the correct SG Web Access password for the college was provided. This ensures that it is actually a college financial aid administrator registering to use the system.
    - To approve the registration, click on **Approve** at the bottom of the page.
    - To decline the registration, which stores the information in the system for possible later approval, click on **Decline** on the bottom of the page.
  - Verify the college and user now appear in the State Grant Manager system by using **Search Colleges** (under **Colleges** on left side bar menu) and **Users** (under **Configurations** on left side bar menu).

- o To subsequently approve any registrations that were previously declined, change the **Filter by** box on the **Manage College Sign Up** page to **Declined Approval** and follow the preceding steps for approval.

Configurations

Autoresponders

The **Autoresponders** function allows the OHE **Super Admin** to create email text for automated emails generated by the State Grant Manager system.
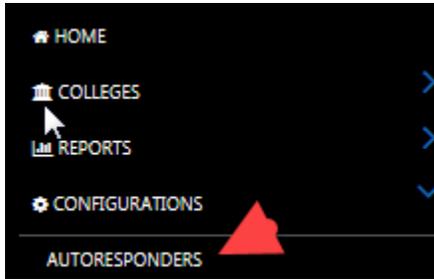
- • To edit or create automated email text:
  - o Click on **Configurations** on the left sidebar menu to open up the sub-menu.
  - o Click on **Autoresponders** on the sub-menu to open the **Manage Autoresponders** page.
    - ▪ To edit an existing email, click on **Edit** under the **Actions** box in the right hand column. Make any necessary changes and click on **Submit** to save the changes.
    - ▪ The **Status** field at the bottom of the page will allow the **Super Admin** to delete or inactivate an existing automated email.
    - ▪ To add a new automated email, click on **Add Autoresponder** under the **Autoresponders Actions** box in the top right hand corner of the page.

Manage Autoresponders

Manage all the notification emails for this application.

Need Help ⑦

Find by name:

Template name	Subject	From email	
Admin College Sign Up	College Registration Request Pending	jholland@seiconsultingllc.com	Actions ▾
College Sign Up	Thank You for Your State Grant Manager System Registration	jholland@seiconsultingllc.com	Edit / Manage emails
College Sign Up Approved	State Grant Manager System Account Approval	jholland@seiconsultingllc.com	Actions

Edit Autoresponder

Need Help ⑦

Autoresponder Type

Admin College Sign Up Email ▾

Template Name

Admin College Sign Up

Subject

College Registration Request Pending

Message

File ▾ Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾ Tools ▾

↶ ↷ | Formats ▾ | **B** *I* | ☰ ☰ ☰ ☰ | ☰ ▾ ☰ ▾ ☰ ☰ | 🔗 🖼 <>

A new college has recently registered on the State Grant Manager website. Please log in to review and approve this registration.

p

Template Location

http://50.63.14.91/content/emails/emailtemplate.html

From Email Address

jholland@seiconsultingllc.com

Status

Active ▾

Submit   Cancel

Developer APIs

This function will allow colleges to interface with the State Grant Manager system database directly for the purpose of importing or exporting data.
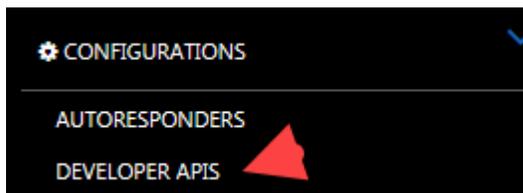
- To edit or create a **Developer API:**
  - Click on **Configurations** on the left sidebar menu to open up the sub-menu.
  - Click on **Developer APIS** on the sub-menu to open the **Developers API** page.
    - To edit an existing API, click on **Edit** under the **Actions** box in the right hand column. Make any necessary changes and click on **Submit** to save the changes.
    - The **Status** field at the bottom of the page will allow the **Super Admin** to delete or inactivate an existing developer API.
    - To add a new developer API, click on **Add Developers API** under the **Developers API Actions** box in the top right hand corner of the page.

Funding Variables

The **Funding Variables** function allows the OHE **Super Admin** to enter State Grant award calculation parameters each aid year. The state funding variables are then selected by colleges when they set up their **Term Vars** under **Manage Term Vars**. At least one **Funding Variables** set should be completed for each aid year (or two if OHE wants to set up both estimated and final parameters). However, if parameters are changed during the aid year, the OHE **Super Admin** should create a new **Funding Variables** set for that aid year under a different name.

For example, the OHE **Super Admin** might first create a **Funding Variables** set that reflect the estimated State Grant award calculation parameters prior to the Legislature setting the official parameters (e.g., 2018-2019 Funding Variables Estimated). Once the official parameters are known, the **Super Admin** would create a second set of **Funding Variables** with a slightly different name (e.g., 2018-2019 Funding Variables Final). If the final parameters change during the aid year where only certain terms are affected (e.g., LME increase to spend out projected surplus), the **Super Admin** would create a third set of funding variables with another name (e.g., 2018-2019 Funding Variables Revised).

To edit or create **Funding Variables**:

- Click on **Configurations** on the left sidebar menu to open up the sub-menu.

- Click on **Funding Variables** on the sub-menu to open the **Funding Variables** page.

- To add **Funding Variables** for the aid year, click on **Add Funding Variables** under the **Funding Variables Actions** drop down box in the upper right hand corner of the page to open up the **Add Variables** page.
- On the **Add Variables** page, enter the following fields:
  - **Title**
    - Enter the name of the **Funding Variables** set. Choose a name that will be easy for college users to understand.
  - **Parent Contribution %**
    - Percentage used to prorate the federal annual 9-month Parent Contribution prior to its subtraction within the State Grant award calculation for dependent students. Initialized by OHE each aid year. Allows for two decimal places. Does not change during the aid year. For the 2017-2018 aid year, this percentage was 84 percent, such that a $1,000 federal parent contribution was prorated to $840 prior to subtraction within the State Grant award calculation.
  - **Student Share %**
    - The percentage of the State Grant award calculation budget assigned to the student. Initialized by OHE each aid year. Allows for two decimal places. Can later be increased by OHE for term(s) during the aid year when a State Grant program funding shortfall is projected.
  - **Independent With Dependents Contribution %**
    - Percentage used to prorate the federal 9-month annual EFC prior to its subtraction within the State Grant award calculation for independent students with dependents other than a spouse. Initialized by OHE each aid year. Allows for two decimal places. Does not change during the aid year.
  - **Independent Without Dependents Contribution %**
    - Percentage used to prorate the federal 9-month EFC prior to its subtraction within the State Grant award calculation for independent students without dependents other than a spouse. Initialized by OHE each aid year. Allows for two decimal places. Does not change during the aid year.

- o **Maximum Units – Quarter**
  - ▪ Units of postsecondary attendance cutoff for students attending a college on the quarter system. Students with units greater than the cutoff are no longer eligible for a State Grant. Initialized by OHE each aid year. Allows for two decimal places. Currently set at **94.40** units. Does not change during the aid year.
- o **Maximum Units – Semester**
  - ▪ Units of postsecondary attendance cutoff for students attending a college on the semester system. Students with units greater than the cutoff are no longer eligible for a State Grant. Initialized by OHE each aid year. Allows for two decimal places. Currently set at **93.60** units. Does not change during the aid year.
- o **State Contribution Surcharge %**
  - ▪ Percentage used to increase the prorated EFC or Parent Contribution, as directed by OHE, in cases when State Grant awards must be reduced due to a projected State Grant program funding shortfall. Initialized by OHE each aid year. Allows for two decimal places. For example, if the State Contribution Surcharge were 10 percent, a federal Parent Contribution of $1,000 would first be prorated by the parent contribution percentage for that aid year (e.g., for the 2017-2018 aid year, $1,000 x .84 = $840) and then increased by 10 percent (e.g. $840 x 1.10 = $924).
- o **State Contribution Deduction** (this field is currently not in use – Enter $0)
  - ▪ Dollar amount used to decrease the prorated EFC or Parent Contribution within the State Grant award calculation. Initialized as $0 for all terms. No cents. If result is less than $0, result is set to $0. For example, if the 9-month annual federal Parent Contribution were $500, and the deduction were $600, the Parent Contribution would be prorated by 94 percent to $470. The deduction of $600 from $470 would be -$130, which would be set to $0. Does not change during the aid year.
- o **LME**
  - ▪ The uniform annual living and miscellaneous expense (LME) added to the tuition and fees to arrive at the annual State Grant award calculation budget.
- o **Four Year Cap**
  - ▪ Dollar amount of annual tuition and fee cap used within the State Grant award calculation for students in four-year degree programs. Students in four year programs attending colleges with tuition and fees in excess of the cap have the cap amount used to calculate the State Grant award. This amount is based on the highest tuition and fees charged by a four-year public college or university in Minnesota. Initialized by OHE each aid year. Does not change during the aid year.
- o **Two Year Cap**
  - ▪ Dollar amount of tuition and fee cap used within the State Grant award calculation for students in programs of two-years or less in duration. Students in programs of two years or less in duration attending colleges with tuition and fees in excess of the cap have the cap amount used to calculate the State Grant award. This amount is based on the highest tuition and fees charged by a two-year public college in Minnesota. Initialized by OHE each aid year. Does not change during the aid year.
- o **Start Date**
  - ▪ Start date for the award calculation parameters initialized by OHE each aid year.

- o **End Date**
  - ▪ End date for the award calculation parameters initialized by OHE each aid year.

Title

2017-2018 Funding Variables

Parent Contribution % (example: 99.99)

84.00

Student Share % (example: 99.99)

50.00

Independent With Dependents Contribution % (example: 99.99)

76.00

Independent Without Dependents Contribution % (example: 99.99)

40.00

Maxium Units - Quarter (example: 99.99)

94.40

Maxium Units - Semester (example: 99.99)

93.60

State Contribution Surcharge % (example: 99.99)

0.00

State Contribution Deduction (example: 99.99)

0.00

LME (example: 99999)

9135

Four Year Cap (example: 99999)

14488

Two Year Cap (example: 99999)

5790

Start Date

5/22/2017 12:00:00 AM

End Date

11/1/2018 12:00:00 AM

Submit   Cancel

Help

The Help function allows the OHE Super Admin to add, delete or edit text that appears when the user clicks on the Help icon on each page.

To edit, delete or add **Help** text for a page:

- Click on **Configurations** on the left sidebar menu to open up the sub-menu.
- Click on **Help** on the sub-menu to open the **Manage Help Pages** page.
- To add **Help** text for a page, click on **Add Help** under the **Help Actions** box in the top right hand corner of the page.
- To **Edit** or **Delete Help** text for a page, click on **Edit** or Delete in the **Actions** box in the right hand column for that page.

NOTE: If copying and pasting in text from a Word document, the user may need to reformat in the help text box, since it uses html.

Keycodes

The **Keycodes** page contains information about values presented for fields with drop down boxes in the State Grant Manager system. OHE staff with **Super Admin** roles can change the values for fields or the order in which they are presented. It is anticipated that use of this feature by OHE staff will be rare or nonexistent.
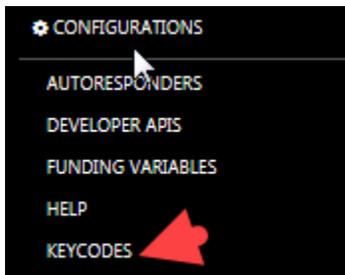
- Click on **Configurations** on the left sidebar menu to open up the sub-menu.
- Click on **Keycodes** on the sub-menu to open the **Manage Keycodes** page.

- Click on **Edit** in the **Action**s box in the right hand column for the field that will be edited.
  - **Option Group** is the field name.
  - **Title** is a value used for the field.
  - **Description** is typically the same as the Title.
  - **Icon**
  - **Sort Order** displays the order in which the field value appears in the drop down box.
  - **Status** shows whether the field is **Active, Inactive** or **Deleted.**

Pages

The **Pages** function allows OHE staff with **Super Admin** roles to change the names of pages as they appear within the State Grant Manager system. It is anticipated that use of this feature by OHE staff will be rare or nonexistent.
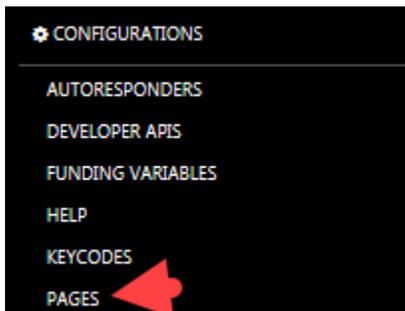
Reset User Password

This page allows the OHE **Super Admin** to reset a password for a user on the system. Passwords expire every 90 days.

To reset a password:

- Click on **Configurations** on the left sidebar menu to open up the sub-menu.
- Click on **Reset Password** on the sub-menu to open the **Reset Password** page.
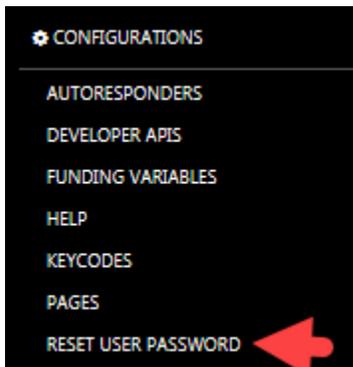
- From the **Email** drop down box, select the username/email address for which the password should be reset.
- Type in the new password identically in the **Password** and **Confirm Password** fields.
- Click on **Submit** to save the changes.

Roles

The Roles page is used to track the various **Roles** (authorizations) used within the State Grant Manager system. At the current time, there is no need to make any changes to the **Roles** currently set up in the system. The current **Roles** have the following authorizations:
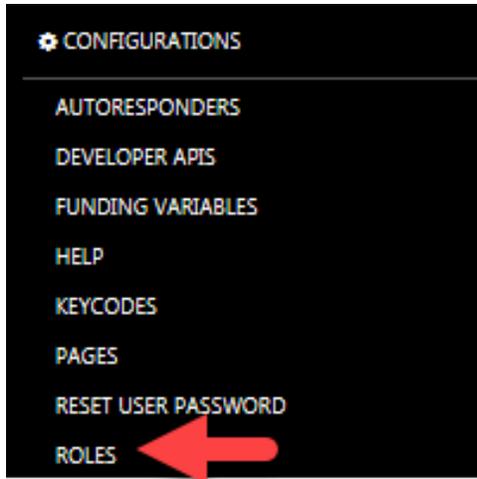
- The role of **Financial Advisor** is used for non-managerial staff and student workers in the financial aid office. This role will allow the user to:
  - View and edit student records for students with ISIR records listing the college's FAFSA code.
  - Award and disburse funds to individual students.
  - Search for student ISIRs on OHE's ISIR database and import individual ISIRs into the State Grant Manager database (for colleges not participating in federal financial aid programs).
- The role of **College Admin** (typically reserved for the financial aid director or main State Grant administrator) can perform the following functions on the State Grant Manager system:
  - View and edit student records for students with ISIR records listing the college's FAFSA code
  - Import student ISIRs to the State Grant Manager system.
    - Colleges participating in federal financial aid programs will import ISIR file batches they received from the U.S. Department of Education.
    - Colleges not participating in federal financial aid programs will search for student ISIR's on OHE's ISIR database and import individual ISIRs into the State Grant Manager database.
  - Export student data and reports from the State Grant Manager database, including creation of State Grant DDS batches.
  - View and resolve **Suspended ISIRs**.
  - Set up system defaults and configurations under **Account**.

- o   Approve and enter other users for the State Grant Manager system from that campus.
- The role of OHE **Admin** (typically for OHE State Grant staff) can perform all of the functions allowed for the role of **College Admin** as well as:
    - o   **Colleges** functions (search for and editing college information, approving college registrations).
- The role of OHE **Super Admin** (typically for OHE State Grant Manager) can perform all functions on the State Grant Manager system.

Users

The **Users** function allows the OHE **Super Admin** to update information for a user of the State Grant Manager system. Since college financial aid directors (**CollegeAdmin r**ole) will be responsible for adding, editing and deleting users for that campus, this **Users** function will typically be used by the OHE **Super Admin** to add or edit any user information for OHE Grant staff. However, the OHE **Super Admin** can perform these actions on behalf of colleges.
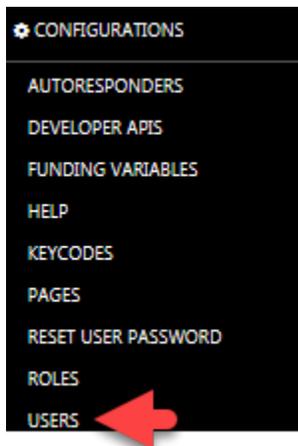
To edit information on existing users:

- Click on **Configurations** on the left sidebar menu to open up the sub-menu.
- Click on **Users** on the sub-menu to open the **Manage Users** page.

- Click on **Edit** in the **Actions** box in the right hand column for the selected user to open the **Edit User** page.
- Enter the user's current or new password identically in the **Password** and **Confirm Password** fields.
- Make any changes to the user's **Phone Number** or **Role** and click on **Submit** to save the changes.

Edit User

Need Help ⑦

Email

collegeadmin@mn.com

Cannot edit email (username)

Password

Confirm Password

Phone Number (Enter all digits with no dashes)

6121111111

Role

College Admin ⌄

Security Question

Which college did you go too? ⌄

Security Answer

U of M

[Submit] [Cancel]

To **Delete** a user:

- Click on **Configurations** on the left sidebar menu to open up the sub-menu.
- Click on **Users** on the sub-menu to open the **Manage Users** page.
- Click on Delete in the **Actions** box in the right hand column for the selected user to open the **Delete User** page.
- Answer **Yes** to "Are you sure you want to delete the following user?"

To **Add** a user:

- Click on **Configurations** on the left sidebar menu to open up the sub-menu.
- Click on **Users** on the sub-menu to open the **Manager Users** page.
- Select **Add Users** from the **User Actions** box in the upper right hand corner of the page to open the **Add User** page.
- Add all of the user's information and click on **Submit** to save.

Transaction Log

The Transaction Log function displays information about activity against the Application Program Interface (API). (An API is code that allows two software programs to communicate with each other.) This is helpful for debugging errors or finding any other API level issues in the system. To access the **Transaction Log:**
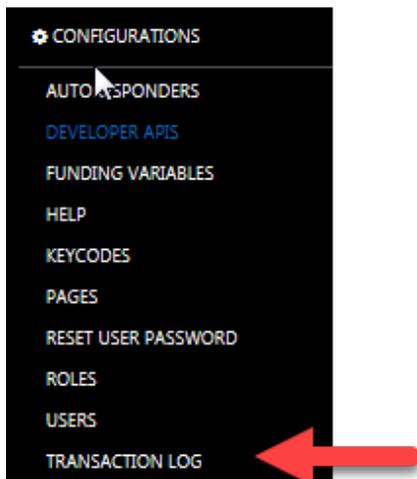
- Click on **Configurations** on the left sidebar menu to open up the sub-menu.
- Click on **Transaction Log** on the sub-menu to open the **Transaction Log Details** page.
- Scroll up or down to see the details for each transaction.

- The **Find by Name** box at the top of the page can be used to search for transactions containing certain terms or numbers.

Working As

This page allows OHE staff with the role of Super Admin to view student records and account information for a particular college, as if the user were logged in as that college.

- Click on **Configurations** on the left sidebar menu to open up the sub-menu.
- Click on **Working As** on the sub-menu to open the **Switch College to Control** page.
- From the drop down box, select the college for which the user needs to access student records or college account information and then click on **Submit**.
- The user is then redirected to the system login page and should log in with the user's usual username and password.
- The user will then see the same left sidebar menu that particular college would see and can then access student records or college account information.
- Once the user logs out, the standard menu associated with that user will then appear after the next login.

Historical

Historical Funding Variables

This page will allow the OHE **Super Admin** to view any changes to **Funding Variables** (i.e. State Grant award calculation parameters) by user, timestamp and a snapshot of what variables looked like prior to being changed.
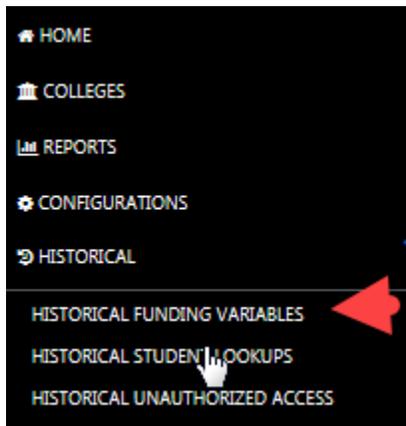
To access **Historical Funding Variables**:

- Click on **Historical** on the left sidebar menu to open up the sub-menu.
- Click on **Historical Funding Variables** on the sub-menu to open the **Historical Funding Variables** page.

Title	Start date	End date	
1	1/1/2017 12:00:00 AM	12/31/2017 12:00:00 AM	Actions ▼
2014-2015	5/21/2017 12:00:00 AM	5/21/2017 12:00:00 AM	View
2014-2015 Funding Variables	1/1/2014 12:00:00 AM	12/31/2014 12:00:00 AM	Actions ▼
2014-2015 Funding Variables	1/1/2014 12:00:00 AM	12/31/2014 12:00:00 AM	Actions ▼
2014-2015 Funding Variables	1/1/2014 12:00:00 AM	12/31/2014 12:00:00 AM	Actions ▼

- Click on **View** in the **Actions** box in the right hand column to view the values for a set of **Funding Variables.**

Historical Student Lookups

This page will allow the OHE **Super Admin** to view how often someone is looking up students against the OHE's State ISIR table. This could be used to flag a user in the system as possibly abusing the system (looking up students against the OHE State ISIR table which should only be accessed by colleges not participating in federal financial aid programs).
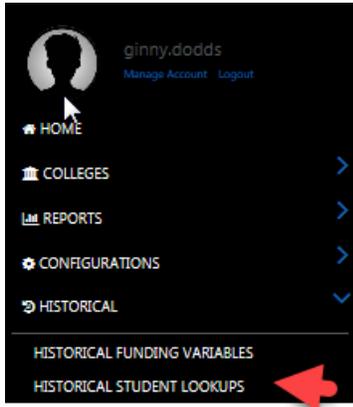
To access **Historical Student Lookups**:

- Click on **Historical** on the left sidebar menu to open up the sub-menu.
- Click on **Historical Student Lookups** on the sub-menu to open the **Historical Student Lookups** page.

View Historical Student Lookups
Need Help ⓘ
Find by name:

There have been no student look up data in the system.

Historical Unauthorized Access

This page will allow the OHE **Super Admin** to see if a user is trying to hack the system and view data for another college. It is also used to flag users who may be abusing the system.
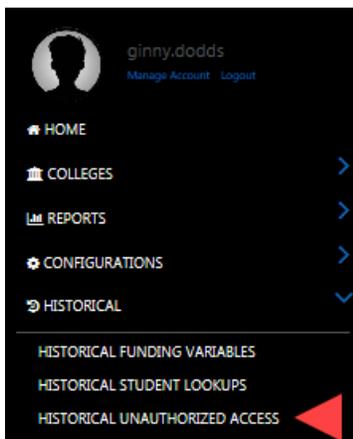
To access **Historical Unauthorized Access**:

- Click on **Historical** on the left sidebar menu to open up the sub-menu.

- Click on **Historical Unauthorized Access** on the sub-menu to open the **View Historical Unauthorized Data Attempts** page.

View Historical Unauthorized Data Attempts

Need Help ⑦

Find by name:

			Search

Look Up Type	Look Up Item	User	Date viewed
36	19	abf2c9d1-82fb-45cb-a905-6321053d33ce	6/8/2017 7:44:48 AM
36	19	abf2c9d1-82fb-45cb-a905-6321053d33ce	6/8/2017 7:46:53 AM
36	19	abf2c9d1-82fb-45cb-a905-6321053d33ce	6/8/2017 7:49:23 AM
36	19	abf2c9d1-82fb-45cb-a905-6321053d33ce	6/8/2017 9:02:55 AM
36	19	abf2c9d1-82fb-45cb-a905-6321053d33ce	6/8/2017 9:49:11 AM
36	19	88e0e477-daff-4166-8b5b-dd94bf734907	6/9/2017 6:41:16 AM
36	19	88e0e477-daff-4166-8b5b-dd94bf734907	6/9/2017 7:04:34 AM

- A **Look Up Type** code **36** means a user has attempted unauthorized access to a student's record that was not imported to the system by that user's college. This code would appear if that user attempted to modify the query string to view that student's record.