



The Rhode Island Scholarship and Grant System

Online User Guide Version 1.5

Table of Contents

LOGGING IN.....	2
<i>System Requirements and Recommendations</i>	<i>2</i>
<i>How to log into the Scholarship and Grant System.....</i>	<i>3</i>
<i>The RIHEAA Web Information Portal</i>	<i>5</i>
<i>Participation Agreement.....</i>	<i>6</i>
<i>Obtaining your Login Credentials</i>	<i>8</i>
<i>Security</i>	<i>12</i>
MAIN MENU	13
<i>How to use the Main Menu</i>	<i>13</i>
<i>How to use the Menu Bar.....</i>	<i>15</i>
<i>How to Change the Year.....</i>	<i>15</i>
CHANGING YOUR PASSWORD.....	16
THE RECONCILIATION BAR	18
<i>Current User Information</i>	<i>18</i>
VERIFY INSTITUTIONAL INFO	19
ACADEMIC PERIOD SETUP.....	23
<i>Setup Screen.....</i>	<i>24</i>
<i>Summary Screen.....</i>	<i>25</i>
MANAGE BUDGETS	26
<i>Update Budget</i>	<i>26</i>
<i>Verify Budgets.....</i>	<i>29</i>
MANAGE ACCOUNTS.....	35
<i>User Account Management.....</i>	<i>36</i>
SEARCHING FOR STUDENTS.....	39
<i>Search for students using Quick Search</i>	<i>39</i>
<i>Search for Students Using Standard Search.....</i>	<i>40</i>
<i>Reviewing Search Results</i>	<i>41</i>
EDIT A STUDENT	42
ADD A STUDENT TO YOUR ROSTER	46
VERIFY ROSTER ONLINE	48
<i>Getting Started.....</i>	<i>48</i>
<i>Roster Filtering Options</i>	<i>49</i>
<i>Verify Roster</i>	<i>51</i>
VIEW OR PRINT ROSTER.....	55
<i>Roster Filtering Options</i>	<i>55</i>
DATA FILE TRANSFER	60
RECEIVE ROSTER FILE	62
<i>Download Roster Files</i>	<i>63</i>
SENDING A FILE TO RIHEAA	66

<i>Send Test File vs. Live File</i>	66
<i>Choose File Type</i>	68
<i>Finding Your File</i>	69
<i>Confirming the File Format</i>	71
<i>Processing Awards</i>	73
<i>Download Result Files</i>	75
REQUEST PAYMENT	77
<i>How to Request Payment</i>	77
<i>Transaction History</i>	80
RHODE ISLAND HIGHER EDUCATION ASSISTANCE AUTHORITY	
VERIFICATION ROSTER DATA FILE FORMAT GUIDE INTRODUCTION...	84
<i>Change History</i>	84
<i>Functional Description</i>	84
<i>Processing Rules</i>	85
<i>File Layout</i>	85
<i>Fixed-Width Format</i>	86
<i>Comma-Separated Value (CSV) Format</i>	86
<i>Field Descriptions</i>	86
<i>Getting Help</i>	89

Logging In

System Requirements and Recommendations

The Scholarship and Grant System was tested using Netscape version 6.0 and Internet Explorer version 5. If you are using that version of one of these browsers, you should not have any issues. If you are using an earlier version of Netscape or Internet Explorer certain functions and cookies may become disabled. If this happens the database will not work.

The Scholarship and Grant System will work with any browser that meets the following **requirements**:

- A computer running Windows (Versions 95 or higher) or Macintosh OS (Versions 95 or higher)
- An internet connection with access to the web
- A web browser that supports HTML 4.0 and CSS 2.0 (Netscape 6.0 and higher or Internet Explorer 5.0 and higher)
- Your screen resolution must be set to 800x600 or better (see note below **)
- JavaScript must be enabled in your web browser (see note below ***)
- Cascading Style Sheets enabled
- Cookies enabled
- 128 Bit encryption

** The RIHEAA web site (as well as the majority of web sites on the Internet) is designed for screen resolutions of no less than 800x600 pixels. Most 15-inch and larger monitors can handle this resolution without an issue and without the user having difficulty seeing text on the screen. If you do not know how to change your screen resolution, contact your IT department for assistance. The site will be functional under smaller resolutions, but you will have to constantly scroll to the right to see hidden information.

*** The RIHEAA system implements several features for FAO's that require a browser-side programming language called JavaScript. JavaScript is usually on by default, but your IT department may have disabled it for security reasons. You can tell if JavaScript is enabled if the blue menu items on the left sidebar turn yellow when your cursor is placed over them. The RIHEAA site will function properly when JavaScript is not available, but you will not be able to use any of the "recalculate" buttons such as the one found on the "Add Budget" screen. Instead, the calculation will happen when you click "Save".

How to log into the Scholarship and Grant System

1. **Open** your internet browser (for example, Netscape Navigator or Internet Explorer).
2. **Type** the following URL into the address bar:
<https://secure.riheaa.org/SnG/> (Example A)



Be sure to use **HTTPS** and not just **HTTP**.



3. **Press** the **ENTER** button or **click** on the **GO** button.
 - To verify that you are using a **Secure Connection**, look for the small **lock symbol** in the lower portion of the window. (Example B)

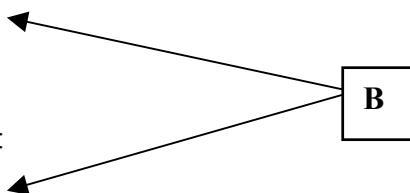


This may look different depending on the internet browser that you are using. See examples that follow:

In Netscape Navigator:



In Internet Explorer:



The **Login** page will be the first screen displayed upon entering the Scholarship and Grant System.

Web Log-In - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address <https://secure.riheaa.org/AuthenticationClient/index.jsp>

riheaa
Rhode Island Higher Education
Assistance Authority

**Assisting Rhode Island's Students...
...Investing in Rhode Island's Future**

Web Information Portal

RIHEAA Web Information Portal

Welcome to the RIHEAA Web Information Portal. This area allows students, loan borrowers, and Financial Aid Officers to securely view information about Rhode Island State Grant Awards, CollegeRoundfund Academic Promise Scholarships, Rhode Island Children's Crusade Scholarships, and Student Loans*. If you've already created an account, simply enter your username and password in the box on the right.

If you have never logged-in, you'll need to create a new account.

Create an New Account

Before you can log-in to view information or accept an award, you must first create an account. Chose the option below that applies to you:

- [I am a Student or Loan Borrower](#)
- [I am a Financial Aid Professional working for a college](#)

* Loan information is currently only available to Financial Aid Officers.

Log-In

Username:

Password:

> [Forgot your password?](#)

> [Never Logged-In before?](#)

Information Portal

- > Scholarships & Grants
- > Meteor™ Loan Lookup
- > Change Your Password
- > Log Out

Home

- The **Login** information consists of two fields:

1. **Username**
2. **Password**

4. Type your **User ID** into the first field.

5. Type your **Password** into the second field.



If you have not been assigned a **Password** by RIHEAA, please see the **Obtaining Your Login Credentials** section of the manual.

6. Click the **Go** button (Example C-1) to access the RIHEAA Web Information Portal (Example C-2).



If you are using Netscape Navigator, be sure to click on the “**Login**” button with the mouse. You will not be able to login using the **ENTER** key. Netscape *does not* recognize the **ENTER** key as a valid way to submit your login information.

Log-In

Username:

Password: **Go!**

> Forgot your password?

> Never Logged-In before?

C-1

The RIHEAA Web Information Portal

The RIHEAA Web Information Portal allows you to access various systems made available to you by RIHEAA, including the collaborative Meteor network. Click on the Scholarship and Grant System button to continue (Example C-2).

RIHEAA Web Information System: Main Menu - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History Print Mail

Address <https://secure.riheaa.org/AuthenticationClient/index.jsp>

riheaa
Rhode Island Higher Education
Assistance Authority

**Assisting Rhode Island's Students...
...Investing in Rhode Island's Future**

Web Information Portal

Jon Williams - Financial Aid Officer Main Menu | [Logout](#)

Scholarship & Grant System

The Rhode Island Scholarship and Grant System contains information about the RI state Grant, CollegeBoundfund Academic Scholarship, and RI Children's Crusade. By clicking the button below, you will be able to view and manage scholarship and grant award information for your institution.

Scholarship and Grant System

Common Manual Online!

COMMON MANUAL

The Common Manual is designed to help train new financial aid and student loan personnel and to assist the experienced officer in finding answers to questions about federal regulations and guarantor policy. This publication is available online!

[The Common Manual](#)

Loan Lookup - The Meteor™ Network

The Meteor Network is a collaborative network of lenders, servicers, and guarantee agencies that have agreed to provide information about student loans to Financial Aid Officers. Meteor displays up-to-the-minute guarantee information about loans guaranteed by RIHEAA.

Other Helpful Tools

- [FAFSA Online](#)
- [Tax Info for Students](#)

C-2

Participation Agreement

If this is your first time logging into the Scholarship and Grant System you will be required to review and agree to the **Participation Agreement**.

- Once you have reviewed the Participation Agreement you can choose I Agree, or I Do Not Agree. (Example **D**)
- You may also Print the Participation Agreement by clicking on the Printer Friendly Version button. (Example **E**)

Financial Aid Professionals

Home > [Financial Aid Professionals](#) > Online Database

Participation Agreement

Before using the RIHEAA Secure Site, you must read and understand the terms of the participation agreement. To accept the terms of the agreement, click on the I AGREE button below. If you cannot accept the terms of this agreement, you will be unable to use the RIHEAA Secure Site.

RHODE ISLAND HIGHER EDUCATION ASSISTANCE AUTHORITY

Agreement for Participation in the

RIHEAA Grant Program
CollegeBoundfund (CBF) Academic Promise Scholarship
RI Children's Crusade Scholarship

The Institution wishes to obtain the benefits of grants and scholarships disbursed by the Rhode Island Higher Education Assistance Authority (the "Authority") for the benefit of Rhode Island residents. The Institution's execution of this statement and acceptance of funds for disbursement to students evidences the Institution's

I AGREE **I DO NOT AGREE** **PRINTER FRIENDLY VERSION**

Agreement History

No individuals from your institution have responded to this agreement at this time.

John Smith
RI School of Software

- If you click the **I Agree** button you will be automatically forwarded to the **Main Menu**.
- If you click the **I Do Not Agree** button the following screen will be displayed.

The screenshot shows the RIHEAA website interface. The header includes the RIHEAA logo and the tagline 'Assisting Rhode Island's Students... ...Investing in Rhode Island's Future'. The left sidebar contains navigation links: 'Online Database', 'Search for Student' (with a text input and 'GO' button), 'Login', 'Help', 'Apply for login', 'Student', 'FAO', 'User Information', and 'No User Currently Logged In'. The main content area is titled 'Secure Site Login' and displays the message 'I DO NOT AGREE'. Below this message, it states: 'You indicated you do not agree with the Institutional Participation Agreement. If this is accurate, please [exit the system](#). If this was an error, please [return to the login screen](#).' At the bottom, there is a copyright notice: 'Copyright © 2002, RI Higher Education Assistance Authority. All rights reserved. Maintained by webmaster@riheaa.org'.

Obtaining your Login Credentials

1. If you do *Not* have a Login you must **Apply for Login**. To obtain a login, Click the **“I am a Financial Aid Professional working for a college”** link. (Example F)

Web Log-In - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address <https://secure.riheaa.org/AuthenticationClient/index.jsp>

riheaa
Rhode Island Higher Education Assistance Authority

**Assisting Rhode Island's Students...
...Investing in Rhode Island's Future**

Web Information Portal

RIHEAA Web Information Portal

Welcome to the RIHEAA Web Information Portal. This area allows students, loan borrowers, and Financial Aid Officers to securely view information about Rhode Island State Grant Awards, CollegeBoundfund Academic Promise Scholarships, Rhode Island Children's Crusade Scholarships, and Student Loans*. If you've already created an account, simply enter your username and password in the box on the right.

Log-In

Username:

Password:

> [Forgot your password?](#)

> [Never Logged-In before?](#)

If you have never logged-in, you'll need to create a new account.

Create an New Account

Before you can log-in to view information or accept an award, you must first create an account. Chose the option below that applies to you:

- [I am a Student or Loan Borrower](#)
- [I am a Financial Aid Professional working for a college](#) ← **F**

* Loan information is currently only available to Financial Aid Officers.

The **Apply for Login** screen will look similar to the screen below.

riheaa
Rhode Island Higher Education Assistance Authority

Assisting Rhode Island's Students...
...Investing in Rhode Island's Future

Secure Site Login

[Home](#) > [Online Database](#)

Enter School Code:

If you received an Access Code from RIHEAA, enter it here:

H

RIHEAA policy prohibits discrimination based upon color, sex, age, national origin, religion, handicap/disability status, veteran status or sexual orientation.

Copyright © 2002, RI Higher Education Assistance Authority. All rights reserved.
Maintained by webmaster@riheaa.org

- The **Apply for Login** information consists of two fields:

1. **School Code**
2. **Access Code**

2. Type your **School Code** into the first field.

3. Type your **Access Code** into the second field.



When entering your Access Code, make sure you check the status of your **CAPS LOCK** key. This field is case sensitive.

4. Click the **Submit** button to access the Scholarship and Grant System. (Example **H**)



If your school has not been assigned an **Access Code** from RIHEAA you can still **Apply for a Login** by entering only your School Code and clicking the **Submit** button.

Once you click on the submit button you will be required to complete information for your login. The following screen will differ depending on how you Applied for a Login.

- If you **Applied for a Login** with an **Access Code** you will see the following screen. (Example I)
 - If you **Applied for a Login** *without* an **Access Code** you will see the following screen. (Example J)
5. Enter all Information as it applies to your school.
 6. Click the **Request Login** button. (Example K)

Attention!



Fields that are marked with a red asterisk are required fields and must be completed to submit the form correctly.

I

riheaa
Rhode Island Higher Education
Assistance Authority

Assisting Rhode Island's Students...
...Investing in Rhode Island's Future

Secure Site Login

Home > Online Database

School Code Entered: 001100

Your Information

First Name: *
Last Name: *
Title:
Email: *
Confirm Email: *
Phone:
Fax:

Request Login

K

J

riheaa
Rhode Island Higher Education
Assistance Authority

Assisting Rhode Island's Students...
...Investing in Rhode Island's Future

Secure Site Login

[Home](#) > Online Database

Pell Code Entered:

Educational Institution

Institution Name:

Address:

City/State/Zip:

Your Information

First Name:

Last Name:

Title:

Email:

Confirm Email:

Phone:

Fax:

RIHEAA policy prohibits discrimination based upon color, sex, age, national origin, religion, handicap/disability status, veteran status or sexual orientation.

Copyright © 2002, RI Higher Education Assistance Authority. All rights reserved.
Maintained by webmaster@riheaa.org

If you have submitted your information correctly the following screen will be displayed.
Your password will be emailed to you.

riheaa
Rhode Island Higher Education
Assistance Authority

Assisting Rhode Island's Students...
...Investing in Rhode Island's Future

Secure Site Login

[Home](#) > Online Database

Generating Account Creation Request...

Request Submitted

Your Account Creation Request has been created. You will be contacted when your account has been approved.

RIHEAA policy prohibits discrimination based upon color, sex, age, national origin, religion, handicap/disability status, veteran status or sexual orientation.

Copyright © 2002, RI Higher Education Assistance Authority. All rights reserved.
Maintained by webmaster@riheaa.org

Security

Attention!



Your password is **case-sensitive**, so “**mydogskip7**” is not the same as “**MyDogSkip7**.” If you have trouble logging in, make sure your password is correct, and check the status of your **CAPS LOCK** key on your keyboard.

If you still have trouble logging in, you may contact a Program Officer at RIHEAA for assistance. Since your password is encrypted, RIHEAA will not have access to it. However, the Program Officer may change your password for you.

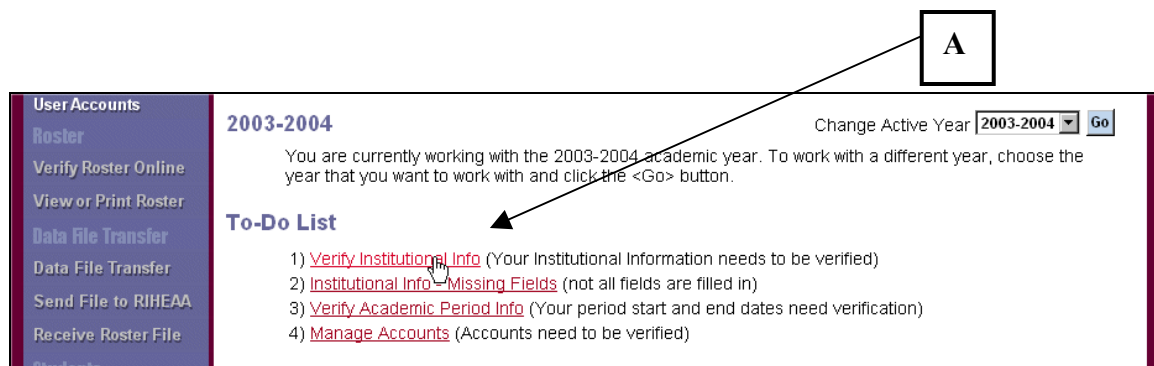
Main Menu

How to use the Main Menu

To navigate the website, there are hyperlinks on which you can **click**. The “**Main Menu Screen**” lists all available pages for your use. All the hyperlinks are in red text and underlined.



When you hover your cursor over a hyperlink, your cursor changes from an arrow to a hand. (Example A)



The **Main Menu** allows you to see what tasks require completion. You may complete each task on your **To-Do List** by **clicking** on the task itself (in red text and underlined).

Menu Bar Options vs. Main Menu Options

The “**Main Menu Screen**” has two built-in options to navigate to each page within the website.

- The first option is the “**Menu Bar.**” (Example B)
- The Second option is the “**Main Menu.**” (Example C)

The screenshot displays the 'Financial Aid Professionals' website. On the left is a dark blue vertical menu bar with a bracket labeled 'B' grouping its items. The main content area has a yellow header and a bracket labeled 'C' grouping its sections. The menu bar includes: 'Online Database' (with a search box and 'GO' button), 'Institutional Setup' (with sub-items: Institutional Info, Academic Period, Manage Budgets, User Accounts), 'Roster' (with sub-items: Verify Roster Online, View or Print Roster), 'Data File Transfer' (with sub-items: Data File Transfer, Receive Roster File, Send File to RIHEAA), 'Students' (with sub-items: Search for, Add Student), 'My Options' (with sub-items: Main Menu, User Agreement, Change Password, Help, Exit/Logoff), and 'Main Menu'. The main content area includes: a breadcrumb trail 'Home > Financial Aid Professionals > Online Database', a '2003-2004' section with a 'Change Active Year' dropdown set to '2003-2004' and a 'Go' button, a 'To-Do List' with five numbered items, an 'Institutional Setup' section with sub-sections 'Institutional Information', 'Manage Budgets', 'Manage Academic Period', and 'Manage User Accounts', and a 'Roster' section.

B

Financial Aid Professionals

Home > Financial Aid Professionals > Online Database

2003-2004 Change Active Year 2003-2004 Go

You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.

To-Do List

- 1) [Verify Institutional Info](#) (Your Institutional Information needs to be verified)
- 2) [Institutional Info - Missing Fields](#) (not all fields are filled in)
- 3) [Manage Budgets](#) (fees and tuition need to be updated)
- 4) [Manage Budgets](#) (Budgets need to be verified)
- 5) [Manage Accounts](#) (Accounts need to be verified)

Institutional Setup

Institutional Information

View or update the RIHEAA database's records concerning mailing address and contact information for RI School of Software Design.

Manage Budgets

View or update the RIHEAA database's records concerning the cost of attendance for RI School of Software Design.

Manage Academic Period

View or update the RIHEAA database's records concerning the academic periods for RI School of Software Design.

Manage User Accounts

Manage the RIHEAA Secure Site user login accounts for RI School of Software Design.

Roster

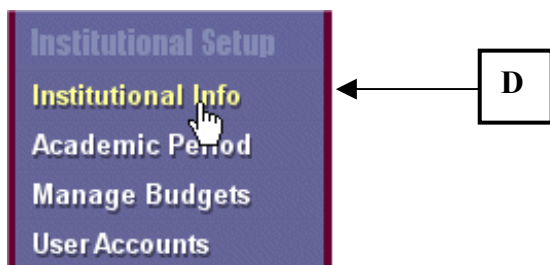
C

How to use the Menu Bar

1. The items on the **Menu Bar** are referred to as the hover-buttons. You will notice each hover-button changes to yellow when the cursor hovers over it. In the example the cursor is hovering over **Institutional Info**. (Example **D**)

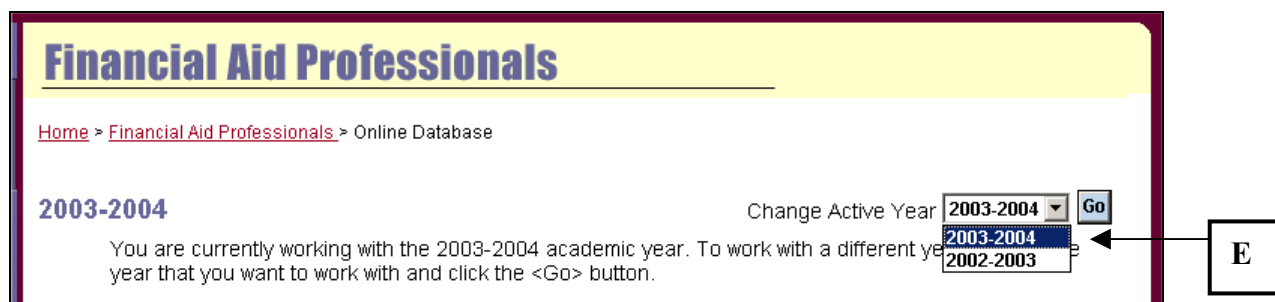


Clicking on any of the hover-buttons will bring you to the corresponding page.



How to Change the Year

To change the year you are working with, click on the black arrow on the upper right hand side of the screen. (This is called a **drop-down menu**). Choose the academic year with which you want to work and click the **Go** button.



Changing your Password

1. From the “Main Menu Screen,” click on either the “Change Password” hover-button (Example A) or the “Change Password” hyperlink (Example B)

A

Data File Transfer

Receive Roster File

Send File to RIHEAA

Students

Search for

Add Student

My Options

Main Menu

User Agreement

Change Password

Help

Exit/Logoff

User Information

A New User
Rhode Island School
Password
Expires: 10/5/2003

Summary for
2003-2004 1st Semester
2003-2004 :

State Grant	
Payments Due:	\$ 0
Refunds Due:	\$ 0
Childrens Crusade	
Payments Due:	\$ 4136
Refunds Due:	\$ 0
Academic Promise	
Payments Due:	\$ 5000
Refunds Due:	\$ 0

Reconcile

Transaction History

User Manual

View or update the RIHEAA database's records concerning the cost of attendance for Rhode Island School.

Manage Academic Period

View or update the RIHEAA database's records concerning the academic periods for Rhode Island School.

Manage User Accounts

Manage the RIHEAA Secure Site user login accounts for Rhode Island School.

Roster

Verify Roster Online

Verify your students, name, amounts, Full/Part time...

View or Print Roster

View students and print the roster.

Data File Transfer

Electronic Data File Transfer Process

Send File to RIHEAA's database with your information. This option will send your student information to the **RIHEAA Secure Site**. Your student information will be processed as soon as it is received, and you may confirm the results online.

Receive Roster File from RIHEAA

Download a roster file from RIHEAA.

Students

Search for Student

Search for students using first name, last name, or social security number.

Add Student

Add students to your roster.

My Options

User Agreement

View the User Agreement for the RIHEAA Secure Site.

Change Password

Change the password that you use to log in to the RIHEAA Secure Site. Passwords expire after 180 days, so you should change your password regularly.

B



Caution!

Passwords **expire after 180 days**. Remember, passwords must be **alphanumeric** (containing letters and numbers) and must be at least **six characters long**.



Attention!

On the “**Change Password**” screen, you will see three text boxes.



Caution!

Your **Password is Case Sensitive**. When entering your **Password**, make sure you check the status of your **CAPS LOCK** key.

2. **Type your Current password** in the first text box labeled “**Current password.**” (Example C)

3. **Hit the tab key** or use your mouse to **move the cursor** into the next text box labeled **“New password.”** (Example D)
4. **Type** your new password a second time in the second text box labeled **“New password again.”** (Example D)

Change Your Password

You can easily change your account password. Just fill in the following form below. Passwords must be alphanumeric (contain letters and numbers) and must be at least six characters long.

Current password:

New password:

New password again:

[Change Password](#)

5. Once the new password is typed into both text boxes, **click on “Change Password.”** (Example E)

Current password:

New password:

New password again:

[Change Password](#)

- If your **Password** change was successful, you will receive confirmation of your change. (Example F)

Password changed

Your password was changed. For security purposes, it will not be displayed on this screen. Please write it down and store it somewhere secure.

Your password will expire on 8/10/2003. Please remember to change it again before then.

[Proceed to Main Menu](#)

- If your password change was unsuccessful, you will receive an error message explaining the exact error. (Example G) The following error message is explaining that the password change was unsuccessful because the password did not have a mixture of both letters and numbers.

Microsoft Internet Explorer

Your password has to be alphanumeric (a mix of both letters and numbers)

[OK](#)

The Reconciliation Bar

The **Reconciliation Bar** is located on the left side of every screen below the **Menu Bar**. The **Reconciliation Bar** contains up-to-the-minute details including:

- The current user's information;
- Summary of current year award totals;
- Your School's current running balance; and
- Disbursement history for the current year.

Current User Information

The top of the **Reconciliation Bar** contains information about the user who is currently logged in. For security purposes, this does not reflect your User ID or School Code.

John Smith	
STATE COLLEGE	
Password	8/30/2003
Expires:	
Summary for	
2003-2004 1st Semester:	
State Grant	
Payments Due:	\$ 600
Refunds Due:	\$ 0
Childrens	
Crusade	
Payments Due:	\$ 0
Refunds Due:	\$ 0
Academic	
Promise	
Payments Due:	\$ 1250
Refunds Due:	\$ 0
Reconcile	
Transaction History	

Verify Institutional Info

1. From the “Main Menu Screen,” click on either the “Institutional Info” hover-button (Example A) or the “Institutional Info” hyperlink. (Example B) You may also choose “Verify Institutional Info” from your to-do list. (Example C)

The screenshot shows the 'Financial Aid Professionals' online database interface. On the left is a vertical navigation menu with categories: Institutional Setup, Roster, Data File Transfer, Students, My Options, and Main Menu. The 'Main Menu' item is highlighted. The main content area has a yellow header and displays the current academic year as '2003-2004'. Below this is a 'To-Do List' with five items, each with a red hyperlink. The 'Institutional Setup' section contains four sub-sections, each with a red hyperlink: 'Institutional Information', 'Manage Budgets', 'Manage Academic Period', and 'Manage User Accounts'. Annotations are present: 'A' points to the 'Institutional Info' link in the left menu; 'B' points to the 'Institutional Information' link in the 'Institutional Setup' section; and 'C' points to the 'Verify Institutional Info' link in the 'To-Do List'.

Online Database

Search for Student **Go**

Financial Aid Professionals

Home > [Financial Aid Professionals](#) > Online Database

2003-2004 Change Active Year **Go**

You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.

To-Do List

- 1) [Verify Institutional Info](#) (Your Institutional information needs to be verified)
- 2) [Institutional Info - Missing Fields](#) (not all fields are filled in)
- 3) [Manage Budgets](#) (fees and tuition need to be updated)
- 4) [Manage Budgets](#) (Budgets need to be verified)
- 5) [Manage Accounts](#) (Accounts need to be verified)

Institutional Setup

[Institutional Information](#)
View or update the RIHEAA database's records concerning mailing address and contact information for RI School of Software Design.

[Manage Budgets](#)
View or update the RIHEAA database's records concerning the cost of attendance for RI School of Software Design.

[Manage Academic Period](#)
View or update the RIHEAA database's records concerning the academic periods for RI School of Software Design.

[Manage User Accounts](#)
Manage the RIHEAA Secure Site user login accounts for RI School of Software Design.

Roster

Left Menu:

- Institutional Setup**
- Institutional Info
- Academic Period
- Manage Budgets
- User Accounts
- Roster**
- Verify Roster Online
- View or Print Roster
- Data File Transfer**
- Data File Transfer
- Receive Roster File
- Send File to RIHEAA
- Students**
- Search for
- Add Student
- My Options**
- Main Menu**
- User Agreement
- Change Password
- Help
- Exit/Logout

2. This will bring your “Institutional Information Page” into view.

3. On the “**Institutional Information Page**,” you can change the following information:
- a. Institution name
 - b. Institution address
 - c. Contact information
 - d. Institutional type
 - e. Operational schedule

Institutional Information

Your Institution's Name:^{*}

STATE COLLEGE

Institutional Address:

Payments to your institution will be mailed to the following address:

Department:^{*}

ENROLLMENT SERVICES

Street Address:^{*}

GREEN HALL
35 CAMPUS AVENUE

City/State/Zip:^{*}

KINGSTON

RI

02881

4. The “**general phone #**” (Example **D**) is different from the “**Phone #**” in that the general phone number is one that students should use to contact your school, whereas the “**Phone #**” is used by RIHEAA to contact you personally. The same rule applies to “**E-mail**” and “**General E-mail**.” (Example **E**)

Contact Information:

First Name:^{*}

JOHN

Last Name:^{*}

SMITH

Title:

FINANCIAL AID DIRECTOR

Phone#:^{*}

(401) 763-8200

D

→

General Phone#:

(Contact for students)

Fax#:

(401) 763-8201

Email:^{*}

jsmith@ricollege.edu

E

→

General Email:

(Contact for students)

Federal Employer ID#
(FEIN):^{*}

12

 -

3456789

 (9 digit number that your business office should know)

Institution Home Page:

Is your school approved by the US Department of Education to participate in at least one federal student financial aid program? ^{*} ☒ **Yes** ☐ **No**

- On this page, you will be required to enter your school's "**Federal Employer ID#**" or "**FEIN**." This number is unique to your school and can be obtained through your school's business office.

Federal Employer ID# - (9 digit number that your business office should know)
(FEIN):*

- In order for your school to be eligible to participate in this program, you must be able to answer the following question "**yes**."

Is your school approved by the US Department of Education to participate in at least one federal student financial aid program? * ☒ **Yes** ☐ **No**

5. If "**no**" is selected, you must follow the directions in the screen that appears.

2003-2004 1st Semester

Change Active Semester:

You are currently working with the 1st Semester of the 2003-2004 academic year (9/3/2003 to 12/19/2003). To work with a different Semester, choose the Semester you want to work with and click the <Go> button.

Not Eligible

Since your school is not approved to participate in at least one federal financial aid program, your school is not eligible to participate in the student aid programs administered by the Rhode Island Higher Education Assistance Authority. Further information is not required from you.

Please click here to [exit and logout](#), or

If you made a mistake and your college is eligible to participate in at least one federal financial aid program, [click here to go back](#).

6. To change your **institution type** or **operational schedule**, simply click on the corresponding “round button.” (Example F) Remember, a red asterisk indicates a **required** field.

F →

Academic Period Setup

Institutional Type (Check one)*

☒ Four-Year Private ☐ Four-Year Public

☐ Proprietary (for profit) ☐ Two-Year Private

☐ Two-Year Public ☐ Voc-Tech Private

☐ Voc-Tech Public

☐ Other

Operational Schedule (Check one)*

☐ Trimesters ☒ Semesters

☐ Quarters ☐ Clock Hours (# of Clock Hours Required to Complete Program)

☐ Other

7. Once changes are saved and verified, the task will be removed from your to-do list.

Save Changes

Academic Period Setup

1. From the **Main Menu** Screen, click on either the “**Academic Period**” hover-button (Example A), the “**Verify Academic Period Info**”, or “**Manage Academic Period**” hyperlinks. (Example B)

The screenshot shows the 'Main Menu' screen of a system. On the left is a vertical navigation menu with the following items: Institutional Setup, Institutional Info, **Academic Period** (highlighted with a mouse cursor), Manage Budgets, User Accounts, Roster, Verify Roster Online, View or Print Roster, Data File Transfer, Data File Transfer, Receive Roster File, Send File to RIHEAA, Students, Search for, Add Student, My Options, Main Menu (highlighted), User Agreement, Change Password, and Help. An arrow labeled 'A' points to the 'Academic Period' item in this menu.

The main content area is titled '2003-2004' and includes a 'Change Active Year' dropdown set to '2003-2004' with a 'Go' button. Below this is a text block: 'You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.'

Below the text is a 'To-Do List' with four items:

- 1) [Verify Institutional Info](#) (Your Institutional Information needs to be verified)
- 2) [Verify Academic Period Info](#) (Your period start and end dates need verification) ← Arrow labeled 'B' points to this link.
- 3) [Manage Budgets](#) (Budgets need to be verified)
- 4) [Manage Accounts](#) (Accounts need to be verified)

Below the list is a section titled 'Institutional Setup' with three sub-sections:

- [Institutional Information](#)**: View or update the RIHEAA database's records concerning mailing address and contact information for RI School of Software Design.
- [Manage Budgets](#)**: View or update the RIHEAA database's records concerning the cost of attendance for RI School of Software Design.
- [Manage Academic Period](#)** ← Arrow labeled 'B' points to this link. Below it: View or update the RIHEAA database's records concerning the academic periods for RI School of Software Design.

Below this is a section titled 'Manage User Accounts' with the text: 'Manage the RIHEAA Secure Site user login accounts for RI School of Software Design.'

At the bottom of the main content area is a section titled 'Roster'.

Setup Screen

After entering and then verifying all of your school's information, you can then move on to your **Academic Period Setup**. Based on your operational schedule, this screen allows you to enter the start and end dates for each one of your academic periods.

1. For example, a school with "Semester" as its operational schedule will need to enter the start and end dates for the first (fall) semester and the start and end dates for the second (spring) semester. (Example C)



When entering dates into the system, use the **mm/dd/yyyy** (01/01/2003) format. (Example D)

The screenshot shows the "Academic Period Setup" screen. At the top, it says "*All dates must be in 'mm/dd/yyyy' format". Below this, there are two rows of date input fields. The first row is labeled "Start Date:" and contains two fields: "10/10/2003" and "1/6/2004". The second row is labeled "End Date:" and contains two fields: "12/12/2003" and "5/10/2004". Below these fields are the labels "1st Semester" and "2nd Semester". At the bottom of the screen, there is a message: "The academic period information above is correct. Click on the button to verify and remove from To-Do list." Below this message are two buttons: "Click to Verify" and "Save Changes".

Callout C points to the "Start Date:" label.

Callout D points to the date format instruction: "*All dates must be in 'mm/dd/yyyy' format".

Callout F points to the "Save Changes" button.

- If the number of academic periods does not match, you can go back to the **Verify Institutional Information** page and choose the operational schedule that best fits your school.
2. To mark this task as complete and remove it from your **To-Do List**, you can click on the "**Click to Verify**" button. (Example E)
 3. To save this information and move on to the **Academic Period Setup** summary screen, click on **Save Changes**. (Example F)

Summary Screen

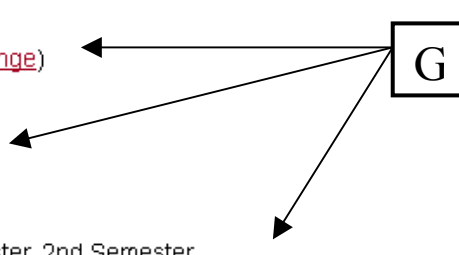
The summary screen allows you to quickly view your school's **Institutional Type**, **Operational Schedule**, and the **Start and End Dates**.

1. If any information is incorrect, click the change hyperlink next to the incorrect information. This will take you to the appropriate screen to correct the information. (Example G)

Academic Period Setup
Institutional Type:
Four-Year Private ([change](#))
Operational Schedule
Semesters ([change](#))
Start and End Dates:

	1st Semester	2nd Semester	
Start Date:	10/10/2003	1/6/2004	(change)
End Date:	12/12/2003	5/10/2004	(change)

[Return to Main Menu](#)



The diagram shows a box labeled 'G' with three arrows pointing to the 'change' hyperlinks in the 'Academic Period Setup' screen. One arrow points to the 'change' link next to 'Four-Year Private', another points to the 'change' link next to 'Semesters', and a third points to the 'change' link next to the 'Start Date' for the 1st Semester.

Manage Budgets

Managing your school's budget consists of verifying, editing, and adding budgets.

Update Budget

- When first entering the system for a new academic year you will be required to update the your school's budget(s) from prior year figures to current year figures. This will be an item on your to-do list, which will remain until the item is completed. (Example A)
1. In the case shown, to update your budgets click on the **Manage Budgets (fees and tuition need to be updated.)** (Example A)

Online Database >

Search for Student

Financial Aid Professionals

Home > [Financial Aid Professionals](#) > Online Database

2003-2004 Change Active Year

You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.

To-Do List

- 1) [Verify Institutional Info](#) (Your Institutional Information needs to be verified)
- 2) [Institutional Info - Missing Fields](#) (not all fields are filled in)
- 3) [Manage Budgets](#) (fees and tuition need to be updated) ← **A**
- 4) [Manage Budgets](#) (Budgets need to be verified)
- 5) [Manage Accounts](#) (Accounts need to be verified)

Institutional Setup

[Institutional Information](#)
View or update the RIHEAA database's records concerning mailing address and contact information for RI School of Software Design.

[Manage Budgets](#)
View or update the RIHEAA database's records concerning the cost of attendance for RI School of Software Design.

[Manage Academic Period](#)
View or update the RIHEAA database's records concerning the academic periods for RI School of Software Design.

[Manage User Accounts](#)
Manage the RIHEAA Secure Site user login accounts for RI School of Software Design.

Roster

Online Database >

Search for Student

Institutional Setup
Institutional Setup
Institutional Info
Academic Period
Manage Budgets
UserAccounts

Roster
Verify Roster Online
View or Print Roster

Data File Transfer
Data File Transfer
Receive Roster File
Send File to RIHEAA

Students
Search for
Add Student

My Options
Main Menu
User Agreement
Change Password
Help
Exit/Logoff

2. Click the **Edit** link. (Example B)

Search for Student

2003-2004

Change Active Year 2003-2004

You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.

Institutional Setup

Institutional Info

Academic Period

Manage Budgets

User Accounts

Roster

Verify Roster Online

View or Print Roster

Data File Transfer

Data File Transfer

Receive Roster File

Send File to RIHEAA

Students

Search for

Add Student

My Options

Main Menu

User Agreement

Change Password

Help

Exit/Logoff

User Information

John Smith

STATE COLLEGE

Password Expires: 4/4/2004

Summary for 2003-2004 1st Semester:

Budget 2003-2004

Please Note -

- Existing data from your standard budget is used as the default values for this new budget.
- Please modify these values for this new budget.
- Please list all amounts based on FULL TIME enrollment even when all students are part time.

Budget Name: Daytime

Is this a program that takes all students 5 years to complete? * ☐ Yes ☒ No

Tuition for RI Resident: * \$

Fees: * \$

Books: * \$

Room and Board - Resident: * \$

Room and Board - Commuter: * \$

Transportation - Resident: * \$

Transportation - Commuter: * \$

Personal: * \$

Other: * \$

Total Resident: \$ 17216

Total Commuter: \$ 14167

[\(Recalculate Total\)](#)

*Fields marked with an asterisk are required fields.
**If you want to add budget information for a specific program, use the add budget button on the previous screen.

B



The budget set as “Default” is the budget used to make initial Rhode Island State Grant awards. You will have the option to change the budget used for each award recipient during the verification process.

3. Once you have more than one budget created, you will also have the option to deactivate a budget or set an alternate budget as the default budget.

[\(edit\)](#) [\(deactivate\)](#) [\(set as default\)](#)

Requested Setting versus Effective Setting

**After a certain date (determined by RIHEAA), requests for changes to institutional budgets will be reviewed by RIHEAA. Some requests may be denied based on the availability of funds.

You can now **Edit** the Budget.

4. Once you have filled in the necessary fields you can **click the Save button**. (Example C)

Search for Student

GO

Institutional Setup

Institutional Info

Academic Period

Manage Budgets

User Accounts

Roster

Verify Roster Online

View or Print Roster

Data File Transfer

Data File Transfer

Receive Roster File

Send File to RIHEAA

Students

Search for

Add Student

My Options

Main Menu

User Agreement

Change Password

Help

Exit/Logoff

User Information

John Smith

STATE COLLEGE

Password Expires: 4/4/2004

Summary for

2003-2004 1st Semester:

2003-2004

Change Active Year 2003-2004 Go

You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.

Budget 2003-2004

Please Note -

- Existing data from your standard budget is used as the default values for this new budget.
- Please modify these values for this new budget.
- Please list all amounts based on FULL TIME enrollment even when all students are part time.

Budget Name: Daytime

Is this a program that takes all students 5 years to complete? *

☐ Yes ☒ No

Tuition for RI Resident: *\$4136

Fees: *\$2048

Books: *\$800

Room and Board - Resident: *\$8348

Room and Board - Commuter: *\$1600

Transportation - Resident: *\$180

Transportation - Commuter: *\$3879

Personal: *\$1570

Other: *\$134

Total Resident:\$ 17216

Total Commuter:\$ 14167

(Recalculate Total)

Save

C

*Fields marked with an asterisk are required fields.

**If you want to add budget information for a specific program, use the add budget button on the previous screen.

- Once you have saved the edited budget, the screen will display the new budget figures and you are ready to verify the budget.

Institutional Setup Institutional Info Academic Period Manage Budgets User Accounts Roster Verify Roster Online View or Print Roster Data File Transfer Data File Transfer Receive Roster File Send File to RIHEAA Students Search for Add Student My Options Main Menu User Agreement Change Password Help	2003-2004		Change Active Year <input type="text" value="2003-2004"/> <input type="button" value="Go"/>
	You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.		
	Budget 2003-2004 Active		
	Please Note - Please list all amounts based on FULL TIME enrollment even when all students are part time. To edit a budget, click the link below the budget labelled (edit).		
	Budget Name: Daytime Budget (default)		
		Requested Setting	Effective Setting**
	Five Year Program?	No	No
	Tuition for RI Resident:	\$12,000.00	\$12,000.00
	Fees:	\$200.00	\$200.00
	Books:	\$0.00	\$0.00
Room and Board - Resident:	\$0.00	\$0.00	
Room and Board - Commuter:	\$0.00	\$0.00	
Transportation - Resident:	\$450.00	\$450.00	
Transportation - Commuter:	\$1,000.00	\$1,000.00	
Personal:	\$900.00	\$900.00	
Other	\$0.00	\$0.00	
Total Resident:	\$13,550.00	\$13,550.00	
Total Commuter:	\$14,100.00	\$14,100.00	
(edit) (deactivate)			

Verify Budgets

Each new academic year, your school budgets will need to be verified. Therefore, when first entering the system for a new academic year you will be required to verify your budgets. This will be an item on your to-do list, which will remain until the item is completed. (Example D)

1. To Verify budgets click on the **Manage Budgets (Budgets need to be verified)** link. (Example D)

Institutional Setup

Institutional Info

Academic Period

Manage Budgets

User Accounts

Roster

Verify Roster Online

View or Print Roster

Data File Transfer

Data File Transfer

Receive Roster File

Send File to RIHEAA

Students

Search for

Add Student

My Options

Main Menu

User Agreement

Change Password

Help

Change Active Year 2003-2004 Go

2003-2004

You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.

To-Do List

- 1) [Verify Institutional Info](#) (Your Institutional Information needs to be verified)
- 2) [Verify Academic Period Info](#) (Your period start and end dates need verification)
- 3) [Manage Budgets](#) (Budgets need to be verified)
- 4) [Manage Accounts](#) (Accounts need to be verified)

Institutional Setup

Institutional Information

View or update the RIHEAA database's records concerning mailing address and contact information for RI School of Software Design.

Manage Budgets

View or update the RIHEAA database's records concerning the cost of attendance for RI School of Software Design.


Manage Academic Period

View or update the RIHEAA database's records concerning the academic periods for RI School of Software Design.

Manage User Accounts

Manage the RIHEAA Secure Site user login accounts for RI School of Software Design.

Roster



2. Once you have confirmed that your budgets are correct, click the **Click to Verify** button. (Example E)

Help

Exit/Logout

User Information

John Smith
RI School of Software Design
Password
Expires: 8/10/2003

Program:
All

2003-2004 Summary:

Total Awards: \$0
Disbursed: \$0
Balance: \$0

Zero Balance:
Your current account balance is zero (\$0).

Disbursement History:
No funds have been disbursed to your institution for the 2003-2004 academic year.

Budget Name: Evening Budget

	Requested Setting	Effective Setting**
Five Year Program?	Yes	Yes
Tuition for RI Resident:	\$10,140.00	\$10,140.00
Fees:	\$150.00	\$150.00
Books:	\$0.00	\$0.00
Room and Board - Resident:	\$0.00	\$0.00
Room and Board - Commuter:	\$0.00	\$0.00
Transportation - Resident:	\$450.00	\$450.00
Transportation - Commuter:	\$1,000.00	\$1,000.00
Personal:	\$900.00	\$900.00
Other:	\$0.00	\$0.00
Total Resident:	\$11,640.00	\$11,640.00
Total Commuter:	\$12,190.00	\$12,190.00

[\(edit\)](#) [\(deactivate\)](#) [\(set as default\)](#)

Additional Budgets

Add A Budget [View Inactive Budgets](#)


Verify Budget Information

The user budget information above is correct.
Click on the button to verify and remove from To-Do list.

Click to Verify

Example E

**After 8/1/2003 your requests for changes to your institutional budgets for the 2003-2004 academic year will be reviewed by RIHEAA before the requested settings become effective. Some requests may be denied based on the availability of funds.



- The **Manage Budgets (Budgets need to be verified)** on your To-Do List will be removed. (Example F)

F

Online Database

Search for Student

Institutional Setup
[Institutional Info](#)
[Academic Period](#)
[Manage Budgets](#)
[User Accounts](#)
[Roster](#)

Financial Aid Professionals

[Home](#) > [Financial Aid Professionals](#) > Online Database

2003-2004

Change Active Year

You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.

To-Do List

- 1) [Verify Institutional Info](#) (Your Institutional Information needs to be verified)
- 2) [Verify Academic Period Info](#) (Your period start and end dates need verification)
- 3) [Manage Accounts](#) (Accounts need to be verified)

How to Add a Budget

At the bottom of the “**Manage Budgets**” screen, you may create an additional budget by clicking on the “**Add A Budget**” button.

Additional Budgets

Add A Budget

[View Inactive Budgets](#)

This will bring you to the “**add a budget**” page.

Financial Aid Professionals

Home > [Financial Aid Professionals](#) > Online Database

2003-2004 Change Active Year **2003-2004** Go

You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.

Please Note -

- Existing data from your standard budget is used as the default values for this new budget.
- Please modify these values for this new budget.
- Please list all amounts based on FULL TIME enrollment even when all students are part time.

New Budget 2003-2004

Budget Name: *

Is this a program that takes all students 5 years to complete? * ☒ Yes ☐ No

Tuition for RI Resident: *

Fees: *

Books: *

Room and Board - Resident: *

Room and Board - Commuter: *

Transportation - Resident: *

Transportation - Commuter: *

Personal: *

Other: *

Total Resident: \$ 11640

Total Commuter: \$ 12190

[\(Recalculate Total\)](#)

Save

Attention!

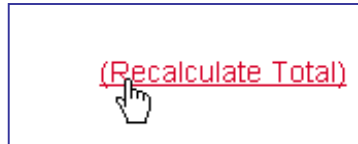
Please Notice the notes at the top of this page (Example G)


- Existing data from your standard budget is used as the default values for this new budget.
- Please modify these values for this new budget.
- Please list all amounts based on FULL TIME enrollment even when all students are part time.

On the “**New Budget**” screen, you must name your new budget (Example **H**) and fill in all other fields marked with a red asterisk.

New Budget 2003-2004
Budget Name: * H

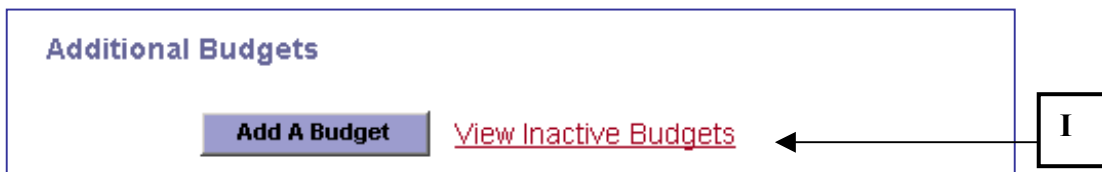
After you have entered the required dollar amounts, you may recalculate the total by clicking on the red “**hyperlink**” text at the bottom of the page that says “**Recalculate Total.**”



Make sure to  when you are finished. This will bring you back to the “**Manage Budgets**” screen.

How to view Active and Inactive Budgets

1. At the bottom of the “**Manage Budgets**” screen is a red text hyperlink. By clicking on it, you may view the inactive budgets. (Example I)



2. Clicking on “**View Inactive Budgets**” will bring you to the following screen where you may **activate** any inactive budgets (Example J), add a budget (Example K), or you may click on “**View Active Budgets**” (Example L) to return to the active budget page.

Online Database >

Search for Student [GO](#)

Financial Aid Professionals

[Home](#) > [Financial Aid Professionals](#) > Online Database

2003-2004 Change Active Year [2003-2004](#) [Go](#)

You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.

Budget 2003-2004 Inactive

Please Note - Please list all amounts based on FULL TIME enrollment even when all students are part time. To edit a budget, click the link below the budget labelled (edit).

Budget Name: Evening Budget (default)

	Requested Setting	Effective Setting**
Five Year Program?	Yes	Yes
Tuition for RI Resident:	\$10,140.00	\$10,140.00
Fees:	\$150.00	\$150.00
Books:	\$0.00	\$0.00
Room and Board - Resident:	\$0.00	\$0.00
Room and Board - Commuter:	\$0.00	\$0.00
Transportation - Resident:	\$450.00	\$450.00
Transportation - Commuter:	\$1,000.00	\$1,000.00
Personal:	\$900.00	\$900.00
Other:	\$0.00	\$0.00
Total Resident:	\$11,640.00	\$11,640.00
Total Commuter:	\$12,190.00	\$12,190.00

[\(activate\)](#)

Additional Budgets

[Add A Budget](#) [View Active Budgets](#)

J

K

L

John Smith
RI School of Software

**After 8/1/2003 your requests for changes to your institutional budgets for the 2003-2004 academic year

Manage Accounts

1. From the **Main Menu** Screen, click on either the “**User Accounts**” hover-button (Example A) or the “**Manage Accounts**” hyperlink. (Example B)

The screenshot shows the 'Financial Aid Professionals' interface. On the left is a sidebar with a search bar and a list of links. The 'Main Menu' section is highlighted. In the main content area, there's a header for 'Financial Aid Professionals' and a section for '2003-2004' with a 'Change Active Year' dropdown. Below this is a 'To-Do List' with six items. Further down is an 'Institutional Setup' section with four sub-sections: 'Institutional Information', 'Manage Budgets', 'Manage Academic Period', and 'Manage User Accounts'. The 'Manage User Accounts' section is highlighted with a box labeled 'B'.

Online Database

Search for Student **GO**

Institutional Setup

Institutional Info

Academic Period

Manage Budgets

User Accounts

Roster

Verify Roster Online

View or Print Roster

Data File Transfer

Data File Transfer

Receive Roster File

Send File to RIHEAA

Students

Search for

Add Student

My Options

Main Menu

User Agreement

Change Password

Help

Exit/Logoff

Financial Aid Professionals

[Home](#) > [Financial Aid Professionals](#) > Online Database

2003-2004 Change Active Year **2003-2004** **Go**

You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.

To-Do List

- 1) [Verify Institutional Info](#) (Your Institutional Information needs to be verified)
- 2) [Institutional Info - Missing Fields](#) (not all fields are filled in)
- 3) [Verify Academic Period Info](#) (Your period start and end dates need verification)
- 4) [Manage Budgets](#) (fees and tuition need to be updated)
- 5) [Manage Budgets](#) (Budgets need to be verified)
- 6) [Manage Accounts](#) (Accounts need to be verified)

Institutional Setup

Institutional Information

View or update the RIHEAA database's records concerning mailing address and contact information for JOHN BROWN UNIVERSITY.

Manage Budgets

View or update the RIHEAA database's records concerning the cost of attendance for JOHN BROWN UNIVERSITY.

Manage Academic Period

View or update the RIHEAA database's records concerning the academic periods for JOHN BROWN UNIVERSITY.

Manage User Accounts

Manage the RIHEAA Secure Site user login accounts for JOHN BROWN UNIVERSITY.

Roster

User Account Management

1. The first screen displayed is a summary screen. It shows you how many users there are for your school. Notice that the **Account Name** is the user's email address. This field is the unique identifier for the account. The next column is the name of the user (last name then first name). (Example C)

User Account Management - RI School of Software Design

[Create New Account](#)

Account Name	Real Name	Permissions		
jsmith@ricollege.edu	Smith, John	Can Manage Budgets Can Request Payment Can Manage User Accounts Receives Email Notifications	(Edit)	Enabled
sbrown@ricollege.edu	Brown, Steve	Can Manage Budgets Can Request Payment Can Manage User Accounts Receives Email Notifications	(Edit)	Enabled
jdoe@ricollege.edu	Doe, Jane	None	(Edit)	

Example C points to the header row. **Example D** points to the first data row. **Example E** points to the third data row.

2. The next column is **Permissions**. This is divided into two sections separated by a light gray line. (Example D) The section above the gray line refers to the **System Permissions**. These list individual system permissions. The section below the gray line displays the access level by program. See the list below for definitions.
 - a. **Manage Budgets** – Allows the user to add, view, disable, and update budget information.
 - b. **Request Payments** – Allows the user to request payment from RIHEAA on the students verified by the school.
 - c. **Manage User Accounts** – Allows the user to add, view, disable, and update user accounts.
 - d. **Receives Email Notifications** – Allows the user to receive information from RIHEAA via email.
 - e. **Academic Promise** – Allows the user to read-only, full, or no access to this program
 - f. **Children's Crusade** – Allows the user to read-only, full, or no access to this program
 - g. **State Grant** – Allows the user to read-only, full, or no access to this program

3. The accounts with a light gray or white background are enabled accounts. The last account shown in a bright red (Example E) has been disabled.
4. When you click on the “**Create New Account**” button, it brings you to this next screen.

Scholarship and Grant System

Create User Account - RI School of Software Design

* All fields marked with an asterisk are required fields.

User Information

School Code: **003410**

First Name:*

Last Name:*

Title:

Phone:

Fax:

Email:*

Confirm Email:*

Program Permission (Roster Screens)

Academic Promise

Children's Crusade

State Grant

System Permissions (Specific Screens)

- ☐ This user can input/update budget information for RI School of Software Design.
- ☐ This user can request payment of awards for the programs where this user has Update Access.
- ☐ This user is designated as the User Account Manager and can create, edit and disable user accounts.
- ☐ This user will receive email notifications pertaining to the programs where this user has Update Access.

Save Changes

Create User Account

5. In the left hand column, some of the information is mandatory in order to create a new account. The red asterisk (*) marks fields that need to be filled in. (Example F)



The **Email** and **Confirm Email** fields need to be *identical* to successfully create the account. (Example G)

6. The **Program Permissions** have drop-down boxes that allow you to select the permissions that you want to give to this account. (Example H)
7. The **System Permissions** have check boxes that allow you to grant or revoke system permissions from this account. (Example I)

Edit User Account - Smith, Jane

* All fields marked with an asterisk are required fields.

User Information

School Code: **003410**

First Name:*

Last Name:*

Title:

Phone:

Fax:

Email:*

Program Permission (Roster Screens)

Academic Promise

Children's Crusade

State Grant

System Permissions (Specific Screens)

- ☒ This user can input/update budget information for RI School of Software Design.
- ☒ This user can request payment of awards for the programs where this user has Update Access.
- ☒ This user is designated as the User Account Manager and can create, edit and disable user accounts.
- ☒ This user will receive email notifications pertaining to the programs where this user has Update Access.

Reset Password

If this user has forgotten his/her password, you may reset their password and email a new random password to this user.

Reset Password

Save Changes / Disable Account

Update User Account

Disable Account

K

J

L

Attention!



After making changes to the account, save the changes by clicking the “Update User Account” button. (Example J)

9. By clicking the **Reset Password** button the system will generate a new random password for that account, and email it to the user of that account. If the system is unable to properly email the password to the account user it will display the password for you to give to the user of that account. (Example K)
10. When clicked, the **Enable/Disable Account** button will either enable or disable this account. (Example L)

Searching for Students

Search for students using Quick Search

You may search for a student using the “**Quick Search Box**” method. The “Quick Search Box” is located in the upper-right of every Scholarship and Grant System screen.

1. **Type** the first few letters of the student’s first name or last name or the entire social security number in the “**Quick Search Box**”. (Example A)
2. **Click** the “**GO**” button.



Search for Students Using Standard Search

You may search for a student using the Standard Search method. This option is always available on the Menu Bar, which is on every Scholarship and Grant System screen. (Example B) It is also available on the Main Menu Screen (Example C)

1. Click “**Search for Student**” from the Menu Bar, or from the Main Menu.

B → **Search for**

Students

- Search for**
- Add Student**
- My Options**
- Main Menu**
- User Agreement**
- Change Password**
- Help**
- Exit/Logout**
- User Information**

John Smith
EDUCATION UNIVERSITY
Password: 8/30/2003
Expires: 8/30/2003

Summary for 2003-2004 1st Semester:

State Grant	
Payments Due:	\$ 0
Refunds Due:	\$ 0
Childrens Crusade	
Payments Due:	\$ 0
Refunds Due:	\$ 0
Academic Promise	
Payments Due:	\$ 0
Refunds Due:	\$ 0

[Transaction History](#)

Manage Academic Period
View or update the RIHEAA database's records concerning the academic periods for EDUCATION UNIVERSITY.

Manage User Accounts
Manage the RIHEAA Secure Site user login accounts for EDUCATION UNIVERSITY.

Roster

- Verify Roster Online**
Verify your students, name, amounts, Full/Part time...
- View or Print Roster**
View students and print the roster.

Data File Transfer

- Electronic Data File Transfer Process**
Send File to RIHEAA's database with your information. This option will send your student information to the **RIHEAA Secure Site**. Your student information will be processed as soon as it is received, and you may confirm the results online.
- Receive Roster File from RIHEAA**
Download a roster file from RIHEAA.

Students

- Search for Student** ← **C**
Search for students using first name, last name, or social security number.
- Add Student**
Add students to your roster.

2. Type your search criteria into the box listed “**Search for:**” (Example D)

Attention!



This can be the first few characters of the student's last name or first name or social security number.

3. Click the “**Search**” button. (Example E)

Search for a Specific Student

Enter the social security number or the first few letters of the student's first or last name in the box below, and click <Search> to locate that student.

Search for:

ANGELL **Search** ← **E**

D →

Reviewing Search Results

- After processing your request, the “**Search Results**” screen will look similar to the following screen:

Search Results

Legend

- ◆ Student on multiple school rosters
- ◆ Student is on only your roster

Results

Last Name	First Name	Social Sec.
◆ <u>SMITH</u>	<u>ADAM</u>	938-56-4598
◆ <u>SMITH</u>	<u>MARTSYL</u>	978-72-0426
◆ <u>SMITH</u>	<u>WENDY</u>	066-42-3535

Search Again?
To search again, [click here](#).



Click on the **First** or **Last Name** to **view** or **edit** a student's information.

Edit a Student

There are a few different methods to get to the **Edit Student** screen. The **Edit Student** screen does not have a menu option available like some of the previous screens reviewed. Some of the different ways to access are:

- Once you have **Added a Student to Your Roster**, you will be required to complete or update the **Edit Student** screen. The process of adding a student will not be complete until this is done. (See the **Add Student** section for more information.);
- When you choose the option to **Search for a Student**, you can **click** on the **Student's First or Last Name** to bring you to the **Edit Student** screen for that student; or,
- While **Verifying Your Roster Online** you can **click** on the **Student's Name** to access the **Edit Student** screen.

The “**Edit Student**” screen has **six sections** to separate the different types of student information.



Refer to the illustration following each section for an example of each field.

The first section of **Edit Student** is the student's general information. This section includes:

- Last Name
- First Name
- Social Security Number (SSN)
- Date of Birth (DoB)

Edit Student	
Last Name:	SSN:
<input type="text" value="BENNETT"/>	<input type="text" value="789-72-3455"/>
First Name:	DoB:
<input type="text" value="MARY"/>	<input type="text" value="10/26/1983"/>

The second section holds all of the **FAFSA Information**.

- The first field is **Expected Family Contribution (EFC)**. This is the field as reported on the student's FAFSA.
- The second field is **Adjusted EFC**. This field should be used for edits to the **EFC** such as professional judgment, federal verification and corrections.
- The **Dependency Status** drop-down box sets the student's status to dependent or independent.

FAFSA Information
EFC:
\$ (as reported from FAFSA)
Adjusted EFC:
\$ (use this field for edits to the EFC such as professional judgment, federal verification and corrections)
Dependency Status:
 ▼

The Third section describes the student's **Academic Period Information**. This section is split between each academic period.

- The first field is **Budget**. Your institution's budgets will appear in this drop-down box. The **Budget** that applies to this student should be selected.
- The second field in this section is the **Full/Part** drop-down list. This should be completed with the **student's enrollment status** at your school.

Each program that the student qualifies for will be displayed. The following information is required for each student.

- The **Eligibility Codes**. To verify the student you must enter the **Eligibility Code** that applies.



For a description of **Eligibility Codes** click the help link. (Example A)

- The **Calculated Award Amount**. This field displays the amount for which the student qualifies. This amount may change if information on the student's record is edited.
- The **Adjusted Award Amount** field can be used to award the student an amount less than the **Calculated Award Amount**. If this field is blank the student will be awarded the amount in the **Calculated Award Amount** field.

1st Semester of the 2003-2004 academic year

Budget: **Full/Part:**

Academic Promise

Eligibility Codes: [\(help\)](#)

A

Calculated Award Amount: \$

Adjusted Award Amount: \$
(blank = no maximum)

State Grant

Eligibility Codes: [\(help\)](#)

Calculated Award Amount: \$

Adjusted Award Amount: \$
(blank = no maximum)

2nd Semester of the 2003-2004 academic year

Budget: **Full/Part:**

Academic Promise

Eligibility Codes: [\(help\)](#)

Calculated Award Amount: \$

Adjusted Award Amount: \$
(blank = no maximum)

State Grant

Eligibility Codes: [\(help\)](#)

Calculated Award Amount: \$

Adjusted Award Amount: \$
(blank = no maximum)

The fourth section is **Save and Recalculate**.

- **Reason for Making Change/Comments:** This section provides a check box to mark the reason why you made a change to a student's record.
- **Additional comments:** This allows you to place a comment on this student's record.
- **Save and Update Display:** This button allows you to **Save** and **Update** the display to reflect the changes you have made.
- **Save and Exit:** Saves the data you have **Edited** then returns you to the **Main Menu** screen.

Save and Recalculate

To update the display to reflect any changes you have made, click the <Save and Update Display> button below.

Reason for making change/comments (optional):

☐ Professional Judgment

☐ Federal Verification

☐ Correction

☐ Budget Change

Additional Comments(Optional):

Save and Update Display

Save and Exit

Cancel

The Fifth section displays the student's **Payment History**. The **Payment History** lists all grants paid to your institution for that student, for that active year.

Payment History					
Academic Period	School	Program	Amount	Enrolled	Date Paid
1st Semester 2003-2004	STATE COLLEGE	State Grant	\$600	Full	7/25/2003

The Sixth section is called the **Change History**. This section displays comments and all changes for the student.

Change History

John Smith8/14/2003Web Site - External - Edit Student

Record Updated

BirthDate changed from **(nothing)** to **2/24/1976**.

Comments:

Add a Student to Your Roster

You will want to use the option to **Add a Student to Your Roster** when a student does not appear on your roster but is attending your school. The RIHEAA Scholarship and Grant System will only allow you to add a student to your roster if RIHEAA has received ISIR data for that student.

- The option to **Add Student** is always available on the Menu Bar (Example A), and is also available on the **Main Menu** screen. (Example B)

1. Click one of the options to “Add Student.”

The screenshot displays the RIHEAA Secure Site interface. On the left is a vertical menu bar with sections: **Students** (containing Search for, Add Student, My Options), **Main Menu** (containing User Agreement, Change Password, Help, Exit/Logoff), **User Information** (containing John Smith, EDUCATION UNIVERSITY, Password, Expires: 8/30/2003, Summary for 2003-2004 1st Semester:), **State Grant** (Payments Due: \$ 0, Refunds Due: \$ 0), **Childrens Crusade** (Payments Due: \$ 0, Refunds Due: \$ 0), **Academic Promise** (Payments Due: \$ 0, Refunds Due: \$ 0), and **Transaction History**). A box labeled 'A' with an arrow points to the 'Add Student' option in the Students section of the menu bar. The main content area on the right has several sections: **Manage Academic Period** (View or update the RIHEAA database's records concerning the academic periods for EDUCATION UNIVERSITY.), **Manage User Accounts** (Manage the RIHEAA Secure Site user login accounts for EDUCATION UNIVERSITY.), **Roster** (containing **Verify Roster Online** (Verify your students, name, amounts, Full/Part time...) and **View or Print Roster** (View students and print the roster.)), **Data File Transfer** (containing **Electronic Data File Transfer Process** (Send File to RIHEAA's database with your information. This option will send your student information to the RIHEAA Secure Site. Your student information will be processed as soon as it is received, and you may confirm the results online.) and **Receive Roster File from RIHEAA** (Download a roster file from RIHEAA.)), and **Students** (containing **Search for Student** (Search for students using first name, last name, or social security number.) and **Add Student** (Add students to your roster.)). A box labeled 'B' with an arrow points to the 'Add Student' option in the Students section.

2. Type the student's **Social Security Number** in the box provided. (Example C)
3. Type the student's **Date of Birth** in the box provided. (Example D)
4. Type the student's **Last Name**, and **First Name**. (Example E)
5. After all information is entered, click “Add this new Student”. (Example F)

Add a New Student - State College

To prevent a student from being entered into the database twice, RIHEAA Online will verify that the student you are about to add does not already exist in the database

Enter the new student's Social Security Number, Date of Birth, Last Name, and First Name.

Social Security Number:

001266789

C

Date of Birth:

10 / 25 / 1979 (MM/DD/YYYY)

D

Last Name:

Smith

First Name:

Jimmy

E

F

Add this new student

- If an exact match cannot be found, a request will be sent to RIHEAA to search for a student with a similar match. For example, if a student's Date of Birth is incorrect, the student will not match automatically, but RIHEAA may be able to validate the student internally and grant you access to that student.
- If the student you added is currently in the database, the **"Edit Student"** screen will be displayed. You must first edit the student data before you may **add the student** to your roster.
- If the student you added does not currently exist in the Scholarship and Grant System you will receive a notice stating, "A request for this student to be added has been sent". (Example G) You will receive an email from RIHEAA staff once your request to add a student has been processed.

Online Database

Search for Student

GO

Institutional Setup

Institutional Info

Academic Period

Manage Budgets

User Accounts

Scholarship and Grant System

2003-2004 1st Semester

Change Active Semester: 2003-2004 1st Semester Go

You are currently working with the 1st Semester of the 2003-2004 academic year (9/3/2003 to 12/20/2003). To work with a different Semester, choose the Semester you want to work with and click the <Go> button.

**** A request for this student to be added has been sent ****

G

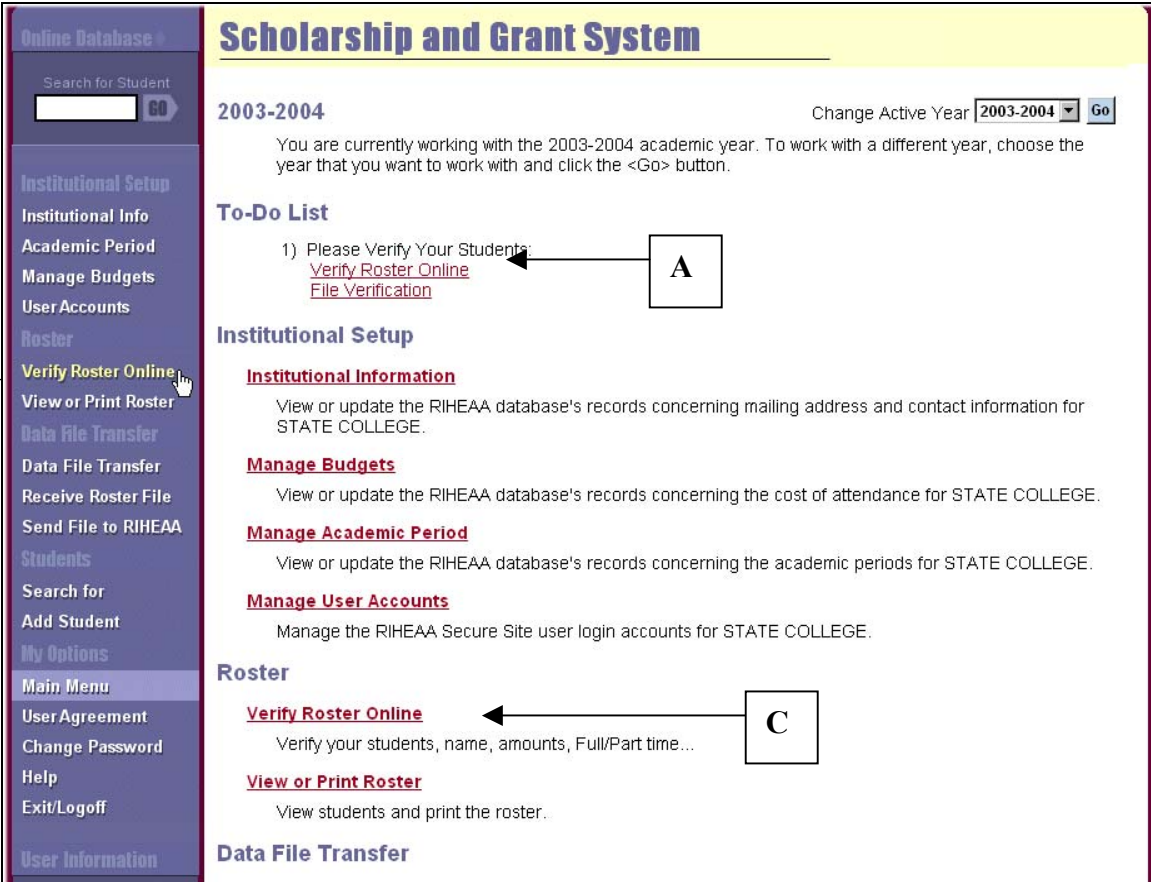
Verify Roster Online

Getting Started

There are three options to access the Verification Screen, you can do so from the:

- To Do List (Example A)
- Side Menu Bar (Example B)
- Main Menu (Example C)

1. To begin the verification process, **click** one of the “Verify Roster Online” options.



The screenshot displays the 'Scholarship and Grant System' interface. On the left is a vertical 'Online Database' sidebar with a search bar and a 'GO' button. Below the search bar are several menu categories: 'Institutional Setup', 'Roster', 'Data File Transfer', 'Students', 'My Options', 'Main Menu', and 'User Information'. A box labeled 'B' with an arrow points to the 'Verify Roster Online' link in the 'Roster' section of the sidebar.

The main content area has a yellow header 'Scholarship and Grant System'. Below it, the '2003-2004' academic year is selected, with a 'Change Active Year' dropdown and a 'Go' button. A message states: 'You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.'

The 'To-Do List' section contains a task: '1) Please Verify Your Students:' with two links: 'Verify Roster Online' and 'File Verification'. A box labeled 'A' with an arrow points to the 'Verify Roster Online' link.

The 'Institutional Setup' section includes links for 'Institutional Information', 'Manage Budgets', 'Manage Academic Period', and 'Manage User Accounts', each with a brief description of its function.

The 'Roster' section contains two links: 'Verify Roster Online' and 'View or Print Roster'. A box labeled 'C' with an arrow points to the 'Verify Roster Online' link.

The 'Data File Transfer' section is partially visible at the bottom.

Roster Filtering Options

Prior to verifying your **Roster File** online, you need to set out the criteria to view the roster.

The screenshot displays the 'Scholarship and Grant System' web application. On the left is a vertical navigation menu with categories: 'Online Database', 'Institutional Setup', 'Roster', 'Students', 'My Options', and 'User Information'. The 'Roster' section is expanded, showing options like 'Verify Roster Online', 'View or Print Roster', and 'Data File Transfer'. The main content area is titled '2003-2004 1st Semester' and includes a 'Change Active Semester' dropdown set to '2003-2004 1st Semester'. Below this is a 'Roster Filtering Options' section. It features a 'Program:' dropdown set to 'All Programs' (labeled with a 'D' in a box) and a 'Status:' section with eight radio button options: 'Not Verified - Eligible' (selected), 'Not Verified - Ineligible', 'Verified Eligible', 'Verified Ineligible', 'Entire Roster', 'Paid', 'Code D', and 'Specific Code'. A 'Show Roster' button is at the bottom of the status options. Below the status options is an 'Options' section with links for 'Search for a Specific Student' and 'Add Student to Roster'. A bracket labeled 'E' in a box groups the 'Status' options.

1. **Program** – Choose the **Program** you wish to view on the Roster (State Grant, Academic Promise, Children’s Crusade). If you have authorized access, you can choose “All Programs” to view a roster that combines all three programs. (Example D)
2. **Status** - Choose the criteria to display on the roster. The Status section allows you to choose from eight different options. (Example E)
 - **Not Verified-Eligible** - You must complete verification for all students listed as “Not Verified-Eligible”. Students listed in other categories are for reference/reporting purposes only.
 - **Not Verified – Ineligible** – Students who listed your school but are not eligible for a RIHEAA administered award for your institution based on program eligibility requirements.

- **Verified Eligible** - Students you have already verified as enrolled and eligible for an award.
- **Verified Ineligible** - Students who listed your school but are not eligible for a RIHEAA administered award at your institution because either: 1) you indicated a reason for ineligibility; 2) another institution has verified eligibility; 3) student accepted a RIHEAA administered award for attendance at another institution; or 4) the student declined all award offers.
- **Entire Roster** – Students who listed your school. They are not necessarily eligible for an award at your institution
- **Paid** - Students who have been fully paid.
- **Code D** – Students who you have marked as pending review by your school to determine financial need.
- **Specific Code** – Filter by a specific code.

3. After you have set the criteria to filter your roster, **click** on the **Show Roster** button (example F).



You also have two quick links from this screen, **Search for a Specific Student** (Example G) and **Add Student to Roster** (Example H). See “**Search for Student**” and “**Add Student**” sections for more instructions.

Roster Filtering Options

Program:
Status:

All Programs

☒ **Not Verified - Eligible** - You must complete verification for all students listed as "Not Verified - Eligible". Students listed in other categories are for reference/reporting purposes only.

☐ **Not Verified - Ineligible** - Students who listed your school that are not eligible for a RIHEAA administered award for your institution under RIHEAA's eligibility requirements.

☐ **Verified Eligible** - Students who you have already verified as enrolled and eligible for an award.

☐ **Verified Ineligible** - Students who listed your school that are not eligible for a RIHEAA administered award at your institution because either: 1) you indicated a reason for ineligibility; 2) another institution has verified eligibility; 3) student accepted a RIHEAA administered award for attendance at another institution; or 4) the student declined all award offers.

☐ **Entire Roster** - Students who listed your school. They are not necessarily eligible for an award at your institution.

☐ **Paid** - Students who have been fully paid.

☐ **Code D** - Students who you have marked as pending review by school to determine financial need.

☐ **Specific Code** - Filter by a specific eligibility code:

A - Meets All Eligibility Requirements

Show Roster

F

←

Options

👁️

Search for a Specific Student

G

←

+

Add Student to Roster

H

←

Verify Roster

The **Verify Roster Online** screen displays your roster information.

- At the top of the screen there is a **drop-down box**, which holds the active academic period. You can **click** on the **drop-down list** and choose a different active academic period. **Click** the “Go” button to view a roster for the selected academic period. (Example I)
- The heading displays your **Institution Name** and **Current Academic Period**. (Example J)
- The **Roster Filtering** option you chose is displayed. (Example K)
- The roster displayed on this screen is broken down into pages. The **page links** are displayed at the top and bottom of each roster page. **Click** on the **arrows** forward or back, one page at a time. Clicking on the **arrows** will save your changes. **Click** on the **page number** to move between pages. Clicking on a page number does *not* save your changes. (Example L)



If you have edited student data and *not* yet **saved** the data you must use the **arrows** to move between pages or your changes will *not* be saved.

riheaa
Rhode Island Higher Education Assistance Authority

Assisting Rhode Island's Students...
...Investing in Rhode Island's Future

Scholarship and Grant System

2003-2004 1st Semester

Change Active Semester: 2003-2004 1st Semester **Go**

You are currently working with the 1st Semester of the 2003-2004 academic year. To work with a different Semester, choose the Semester you want to work with and click the **Go** button.

Roster For: STATE COLLEGE 2003-2004 1st Semester

Filter: All students that are Not Verified - Eligible

- Verify each student's eligibility below and enter an appropriate eligibility code.
- You must enter an eligibility code for each student in order to complete the verification process and receive payment for that student.
- Click on the student's name for more detailed information.

Navigation: <== [1] 2 3 4 5 6 ==>

Last Name	First Name	Social Sec.	EFC	Dependant	Program Budget	Full Time Grant	Part Time Grant	Amt Paid
ABADIER	MICHAELA	973-90-8662	1175	Dependant	Daytime	<input checked="" type="radio"/> Full	<input type="radio"/> Part	

Academic Promise Eligibility Codes: (help) \$1,250 \$0

- The first three columns are the student's **Last Name**, **First Name** and **Social Security Number** (SSN). Clicking on the first or last name provides more detailed student information on the Student Edit Screen.
- The following column lists the student's **EFC**. (Expected Family Contribution) This field should be verified for accuracy. Edit the EFC if it is not correct
- The next column is the **Dependency Status**. This is a drop-down box which can be edited with either "Dependent" or "Independent".
- The next column is **Program Budget**. Your institution's budgets will appear in this drop-down box. The **Program Budget** that applies to this student should be selected.
- The following two columns allow you to verify the student's enrollment status. The corresponding "round button" allows you to select **Full Time** or **Part Time**.
- On the next line the **Program** is displayed. Students may qualify for multiple programs from RIHEAA; therefore each of these programs will be displayed.
- The next column is the **Eligibility Codes**. To verify the student you must enter the **eligibility code** that applies to each program displayed.



For **help** on eligibility codes, **click** on the "**help**" link. (Example **M**)

Eligible	
<input type="checkbox"/>	A. Meets All Eligibility Requirements
<input type="checkbox"/>	B. Has Financial Need Less Than Award For This Term. \$ <input type="text"/>
<input type="checkbox"/>	C. Is Withdrawn but Charged Tuition \$ <input type="text"/> Pro-Rata Calculator
Pending	
<input type="checkbox"/>	D. Is Pending Review of File To Determine EFC and/or Financial Need for Grant/Scholarship
Not Eligible	
<input type="checkbox"/>	E. Has No Financial Need
<input type="checkbox"/>	F. Has Not Enrolled
<input type="checkbox"/>	G. Has Enrolled Less than Half Time
<input type="checkbox"/>	H. Is In Program of Less than 600 Clock Hours
<input type="checkbox"/>	I. Is Not Matriculating
<input type="checkbox"/>	J. Is On Leave of Absence
<input type="checkbox"/>	K. Is Not Making Satisfactory Progress
<input type="checkbox"/>	L. Is Considered a Resident of a State Other than RI
<input type="checkbox"/>	M. Has Bachelor's Degree
<input type="checkbox"/>	N. Is a Graduate Student
<input type="checkbox"/>	O. Is In Default of a Federal Student Loan
<input type="checkbox"/>	P. Owes a Refund on a Pell Grant or SEOG
<input type="checkbox"/>	Q. Does Not Meet Selective Service Requirements
<input type="checkbox"/>	R. Is Ineligible Due to a Drug Conviction
<input type="checkbox"/>	V. Is Deceased
<input type="checkbox"/>	W. Is Not Planning to Attend. Student responded to RIHEAA's request for enrollment plans.
<input type="button" value="Save Changes"/>	

- The following columns are the **Calculated Grant** fields. These fields display the grant amount, calculated by the Scholarship and Grant System, based on the previous information your institution has verified.



The **Calculated Grant** fields can be edited to change the grant to an amount that is lower than the calculated grant.

Roster For: STATE COLLEGE 2003-2004 1st Semester

Filter: All students that are Not Verified - Eligible

- Verify each student's eligibility below and enter an appropriate eligibility code.
- You must enter an eligibility code for each student in order to complete the verification process and receive payment for that student.
- Click on the student's name for more detailed information.

Navigation: [1] 2 3 4 5 6 [=>]

Last Name	First Name	Social Sec.	EFC	Dependant	Program	Budget	Full Time Grant	Part Time Grant	Amt Paid
ABADIER	MICHAELA	973-90-8662	1175	Dependant	Daytime	Full			
	Academic Promise		Eligibility Codes:		(help)		\$1,250	\$0	
ALMQUIST	MEGHAN	655-98-8454	0	Independent	Daytime	Full			
	State Grant		Eligibility Codes:		(help)		\$600	\$600	
ALONZO	ROSANNA	271-14-3496	1062	Dependant	Daytime	Full			
	Childrens Crusade		Eligibility Codes:		(help)		\$2,068	\$0	
	Academic Promise		Eligibility Codes:		(help)		\$1,250	\$0	
	Was Last Year's GPA >= 2.50 (or equivalent) <input type="radio"/> Yes <input type="radio"/> No								
BACCHUS	LUCY	098-47-9450	4099	Dependant	Daytime	Full			
	State Grant		Eligibility Codes:		(help)		\$600	\$350	
BARTELL	ASHLEY	608-81-4716	2376	Dependant	Daytime	Full			
	State Grant		Eligibility Codes:		(help)		\$600	\$425	
	Childrens Crusade		Eligibility Codes:		(help)		\$2,068	\$0	

M

Attention!



If a student is a recipient of the **Academic Promise** program and is **not** a freshman, an additional line will be displayed. This line will require you to confirm that the student's GPA or cumulative GPA meets the Academic Promise Scholarship requirement for that student's cohort year. (Example N)

ALONZO	ROSANNA	271-14-3496	1062	Dependant	Daytime	Full			
	Childrens Crusade		Eligibility Codes:		(help)		\$2,068	\$0	
	Academic Promise		Eligibility Codes:		(help)		\$1,250	\$0	
	Was Last Year's GPA >= 2.50 (or equivalent) <input type="radio"/> Yes <input type="radio"/> No								

N

Once you have verified grants you will want to **save** your changes. There are four options to save your roster verification.

- **Save** button - Clicking on the **Save** button will save your changes to the current page and allow you to remain on this page. (Example **O**)
- **Save and Return Later** button – Clicking on the **Save and Return Later** button will save your changes to the current page and redirect you to the **Main Menu**. (Example **P**)
- **Save and Go To Next Page** – Clicking on the **Save and Go to Next Page** button saves the changes to the current page and displays the next page of your roster. (Example **Q**) If you are on the last page of your roster this will direct you to the **Request Payment** screen. (See the **Request Payment** section for more information)
- **Save and Request Payment** – Clicking on the **Save and Request Payment** button saves the changes to the current page and directs you to the **Request Payment** screen. (Example **R**) (See the **Request Payment** section for more information)

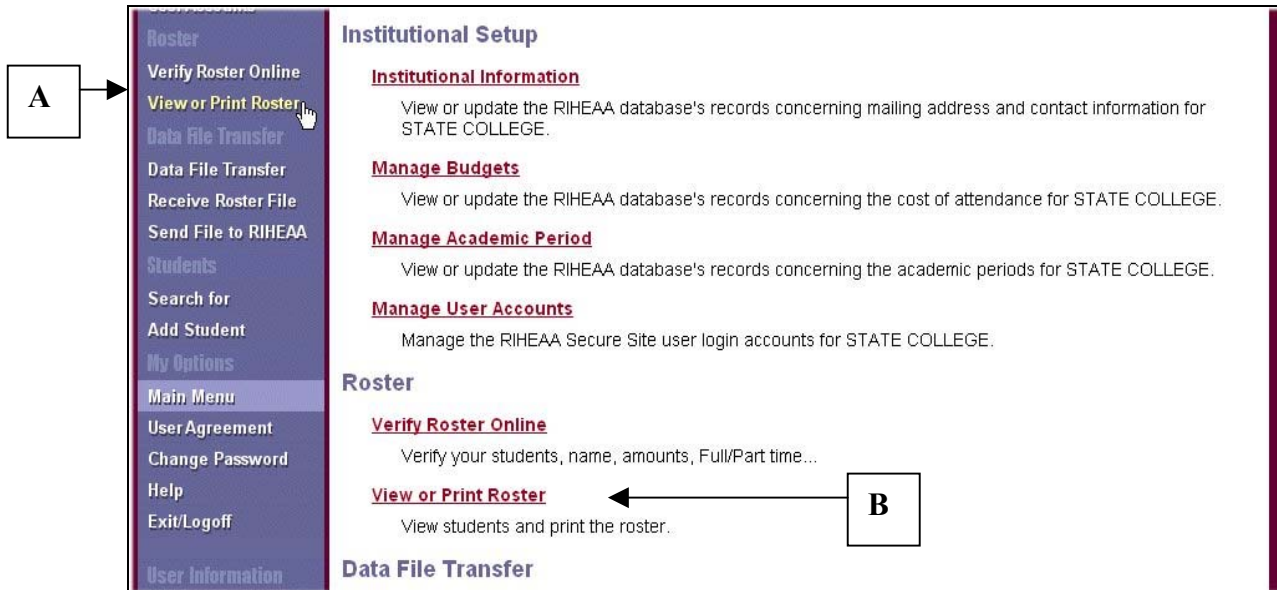


Each time you **save** the changes to a roster page your institution's **reconciliation bar** will be updated with the amount due your institution.

The screenshot shows a web interface for managing a student roster. It displays two student records: GILL, REBECCA and GLOVER, AMANDA. Each record includes fields for phone number, ID, status (Dependant), time (Daytime), and enrollment type (Full/Part). Below these are sections for 'State Grant' and 'Childrens Crusade' with 'Eligibility Codes' and associated monetary values. At the bottom, there is a navigation bar with four buttons: 'Save', 'Save and Return Later', 'Save and Go To Next Page', and 'Save and Request Payment'. Callout 'O' points to the 'Save' button. Callout 'P' points to the 'Save and Return Later' button. Callout 'Q' points to the 'Save and Go To Next Page' button. Callout 'R' points to the 'Save and Request Payment' button. To the left of the buttons is a section labeled 'Options' containing two links: 'Search for a Specific Student' and 'Add Student to Roster'.

View or Print Roster

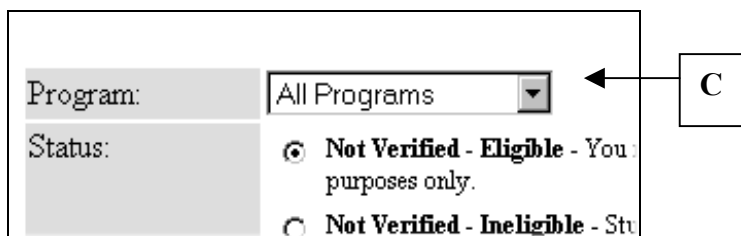
1. To **View or Print Roster**, Click on either the “**View or Print Roster**” hover button on the side menu bar (Example A), or the “**View or Print Roster**” link from the Main Menu. (Example B)
- Once you have chosen to **View or Print Roster** the **Roster Filtering Option** pop-up screen will be displayed.



Roster Filtering Options

Prior to Viewing and Printing your **Roster**, you need to set the criteria to view the roster.


1. **Program** - Choose which Program roster you wish to view. If you have access, you can also choose “All Programs” to view your entire roster. (Example C)



2. **Status** Choose the criteria to display on the roster. The Status section allows you five different options. (Example D)

- a. **Not Verified-Eligible** - You must complete verification for all students listed as “Not Verified-Eligible”. Students listed in other categories are for reference/reporting purposes only.
- b. **Not Verified-Ineligible** - Students who listed your school but are not eligible for a RIHEAA administered award for your institution based on program eligibility requirements.
- c. **Verified Eligible** - Students you have already verified as enrolled and eligible for an award.
- d. **Verified Ineligible** - Students who listed your school but are not eligible for a RIHEAA administered award at your institution because either: 1) you indicated a reason for ineligibility; 2) another institution has verified eligibility; 3) student accepted a RIHEAA administered award for attendance at another institution; or 4) the student declined all award offers.
- e. **Entire Roster** – Students who listed your school. They are not necessarily eligible for an award at your institution
- f. **Paid** - Students who have been fully paid.
- g. **Code D** – Students who you have marked as pending review by your school to determine financial need.
- h. **Specific Code** – Filter by a specific code.

3. After you have set the criteria to filter your roster, **click** on the “**Show Roster**” button (example E).

 [Print](#) [New Filter](#) [Close](#)

Program:

All Programs

Status:

D

☒ **Not Verified - Eligible** - You must complete verification for all students listed as "Not Verified - Eligible". Students listed in other categories are for reference/reporting purposes only.

☐ **Not Verified - Ineligible** - Students who listed your school that are not eligible for a RIHEAA administered award for your institution under RIHEAA's eligibility requirements.

☐ **Verified Eligible** - Students who you have already verified as enrolled and eligible for an award.

☐ **Verified Ineligible** - Students who listed your school that are not eligible for a RIHEAA administered award at your institution because either: 1) you indicated a reason for ineligibility; 2) another institution has verified eligibility; 3) student accepted a RIHEAA administered award for attendance at another institution; or 4) the student declined all award offers.

☐ **Entire Roster** - Students who listed your school. They are not necessarily eligible for an award at your institution.

☐ **Paid** - Students who have been fully paid.

☐ **Code D** - Students who you have marked as pending review by school to determine financial need.

☐ **Specific Code** - Filter by a specific eligibility code:


A - Meets All Eligibility Requirements

Show Roster

E

- Once you have chosen to **Show Roster**, your roster will be displayed on the screen. (Example F)
4. To Print your roster, **click** the **Print** icon in the top left hand corner. (Example G)

G

 [Print](#) [Close](#)

Roster For:

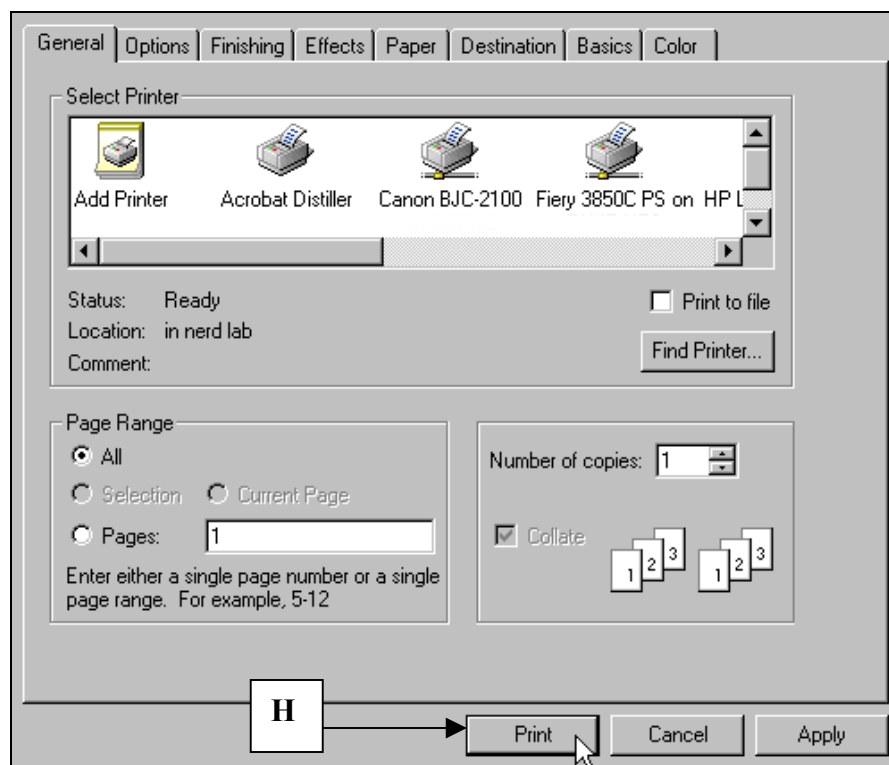
STATE COLLEGE 2003-2004 1st Semester

Filter: All students that are Not Verified - Eligible

Last Name	First Name	Social Sec.	EFC	Dependant	Program Budget	Full Time Grant	Part Time Grant	Amt Paid
ABADIER	MICHAELA	973-90-8662	1175	Dependant	Daytime	Full Time		
	State Grant				Eligibility Codes: None	\$0	\$0	
ABENANTE	MATTHEW	589-99-3238	4049	Independent	Daytime	Full Time		
	State Grant				Eligibility Codes: None	\$0	\$0	
	Academic Promise				Eligibility Codes: None	\$0	\$0	
ABREU	MIRIAM	350-37-9526	19988	Dependant	Daytime	Full Time		
	State Grant				Eligibility Codes: None	\$0	\$0	
	Childrens Crusade				Eligibility Codes: None	\$0	\$0	
	Academic Promise				Eligibility Codes: None	\$0	\$0	
ACEITUNO	RONALD	867-60-9917	5549	Dependant	Daytime	Full Time		
	State Grant				Eligibility Codes: None	\$0	\$0	

F

5. Once you have clicked **Print**, the standard printing dialog box will pop-up, simply choose your printer and click **Print** on this dialog box (Example **H**).



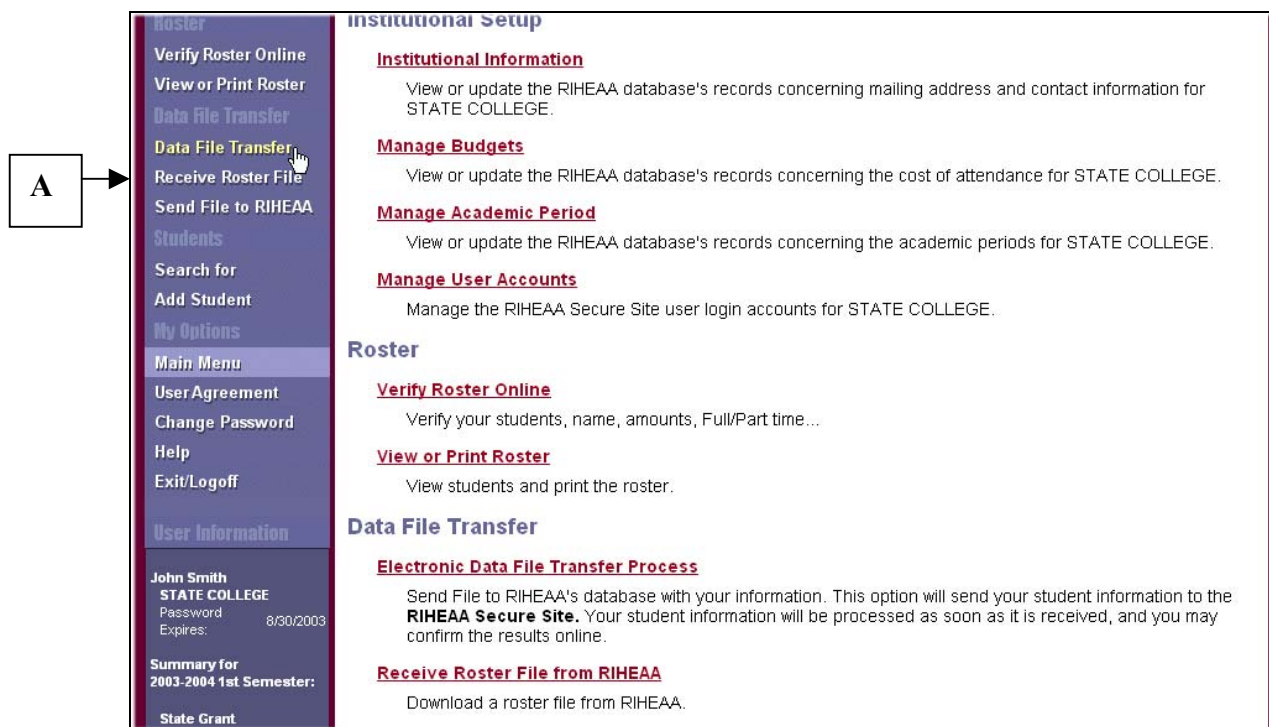
Data File Transfer

Schools are given the opportunity to process student awards automatically using information contained within their own in-house financial aid software. RIHEAA recommends that only schools with large verification rosters use the Data File Transfer option as it will require assistance from your in-house IT staff.

As a service to schools who wish to perform data file transfer verification processing, RIHEAA will provide documentation and technical assistance. See page 84 for information concerning the file format. Please contact RIHEAA at (401) 736-1170 if you would like more information.

The **Data File Transfer** screen will walk you through the steps of the RIHEAA Data File Transfer system.

1. To access this screen **click** on the “**Data File Transfer**” hover-button on the side menu bar. (Example A)



The screenshot displays the RIHEAA system interface. On the left is a vertical side menu bar with various navigation options. A box labeled 'A' with an arrow points to the 'Data File Transfer' link in this menu. The main content area on the right is titled 'Institutional Setup' and contains several sections: 'Institutional Information', 'Manage Budgets', 'Manage Academic Period', 'Manage User Accounts', 'Roster', and 'Data File Transfer'. The 'Data File Transfer' section is further divided into 'Electronic Data File Transfer Process' and 'Receive Roster File from RIHEAA'.

Roster	
Verify Roster Online	
View or Print Roster	
Data File Transfer	
Data File Transfer	
Receive Roster File	
Send File to RIHEAA	
Students	
Search for	
Add Student	
My Options	
Main Menu	
User Agreement	
Change Password	
Help	
Exit/Logoff	
User Information	
John Smith	
STATE COLLEGE	
Password	8/30/2003
Expires:	
Summary for	
2003-2004 1st Semester:	
State Grant	

Institutional Setup	
Institutional Information	
View or update the RIHEAA database's records concerning mailing address and contact information for STATE COLLEGE.	
Manage Budgets	
View or update the RIHEAA database's records concerning the cost of attendance for STATE COLLEGE.	
Manage Academic Period	
View or update the RIHEAA database's records concerning the academic periods for STATE COLLEGE.	
Manage User Accounts	
Manage the RIHEAA Secure Site user login accounts for STATE COLLEGE.	
Roster	
Verify Roster Online	
Verify your students, name, amounts, Full/Part time...	
View or Print Roster	
View students and print the roster.	
Data File Transfer	
Electronic Data File Transfer Process	
Send File to RIHEAA's database with your information. This option will send your student information to the RIHEAA Secure Site . Your student information will be processed as soon as it is received, and you may confirm the results online.	
Receive Roster File from RIHEAA	
Download a roster file from RIHEAA.	

On the Data File Transfer screen you can follow the steps to:

- **Step 1 Download Verification Roster.** This link will direct you to the Download Roster from RIHEAA screen. (Example **B**)
- **Step 2 Instructions** These two links will display instructions on how to Manipulate the File to Verify Students and view helpful hints on viewing a “CSV” (Comma Separated Value) file format. (Example **C**)
- **Step 3 Send the File Back to RIHEAA.** This link will direct you to the Send file back to RIHEAA screen. Which allows you to send your manipulated roster file back to RIHEAA for processing. (Example **D**)

Send Data File to RIHEAA

Instructions for File Transfer Process

Step 1

Download your entire roster from RIHEAA for verification.
[Download Verification Roster](#)

Step 2

Manipulate the file to verify every student.
[Click here for instructions](#)
If you would like help in viewing the csv file:
[Click here for instructions](#)

Step 3

[Send the file back to RIHEAA](#)

B

C

D

Receive Roster File

Receive Roster File allows your institution to import a roster from RIHEAA. This file can then be manipulated to mirror student information on your institution's system, and upload to RIHEAA for verification.

1. Click **Receive Roster File from RIHEAA** button from the **Side Menu Bar** (Example A), or click the **Receive Roster File from RIHEAA** from the **Main Menu**. (Example B)

The screenshot displays the RIHEAA interface for STATE COLLEGE. On the left is a side menu bar with sections: Data File Transfer, Students, My Options, Main Menu, and User Information. The 'Data File Transfer' section in the side menu includes links for 'Data File Transfer', 'Receive Roster File' (highlighted with a mouse cursor and labeled 'A'), and 'Send File to RIHEAA'. The 'Main Menu' section includes 'User Agreement', 'Change Password', 'Help', and 'Exit/Logoff'. The 'User Information' section shows user details for John Smith and a summary for the 2003-2004 1st Semester.

The main content area on the right is titled 'STATE COLLEGE.' and contains several sections: 'Manage Budgets', 'Manage Academic Period', 'Manage User Accounts', 'Roster', and 'Data File Transfer'. The 'Roster' section includes 'Verify Roster Online' and 'View or Print Roster'. The 'Data File Transfer' section includes 'Electronic Data File Transfer Process' and 'Receive Roster File from RIHEAA' (labeled 'B'). Below 'Receive Roster File from RIHEAA' is the text 'Download a roster file from RIHEAA.' and a 'Students' link.

Download Roster Files

To **Receive your Roster File from RIHEAA**, specify the criteria of the roster file you would like to download.

Download Roster From RIHEAA

To download a roster file from RIHEAA, choose your filtering options and click the "Download/View" button below.

Note: CSV format Rosters can be edited in many popular software applications such as Microsoft Excel™. For help downloading and viewing CSV files click [here](#).

Roster Filtering Options

*Estimated time to download your **entire roster** is approximately 1 minutes.*

Program:

All Programs

C

Download Type:

Comma Separated (.csv)

D

Status:

E

☒ **Not Verified - Eligible** - You must complete verification for all students listed as "Not Verified - Eligible". Students listed in other categories are for reference/reporting purposes only.

☐ **Not Verified - Ineligible** - Students who listed your school that are not eligible for a RIHEAA administered award for your institution under RIHEAA's eligibility requirements.

☐ **Verified Eligible** - Students who you have already verified as enrolled and eligible for an award.

☐ **Verified Ineligible** - Students who listed your school that are not eligible for a RIHEAA administered award at your institution because either: 1) you indicated a reason for ineligibility; 2) another institution has verified eligibility; 3) student accepted a RIHEAA administered award for attendance at another institution; or 4) the student declined all award offers.

☐ **Entire Roster** - Students who listed your school. They are not necessarily eligible for an award at your institution.

☐ **Paid** - Students who have been fully paid.

☐ **Code D** - Students who you have marked as pending review by school to determine financial need.

☐ **Specific Code** - Filter by a specific eligibility code:

A - Meets All Eligibility Requirements

Download Roster File From RIHEAA

For help on downloading and viewing file click [here](#).

- 1. Program** - Choose which Program Roster you wish to download. If you have access, you can also choose "All Programs" to download your entire roster. (Example C)
- 2. Download Type** (Example D) Choose the type of file you would like to receive:
 - Comma Separated Value (CSV)** – file name usually ends in ".csv" and commas separate the information in the file.
 - Fixed Width File** – file name usually ends in ".dat" and a fixed amount of spaces separate the information in the file.
- 3. Status** - Choose the criteria to display on the roster. The Status section allows you eight different options. (Example E)

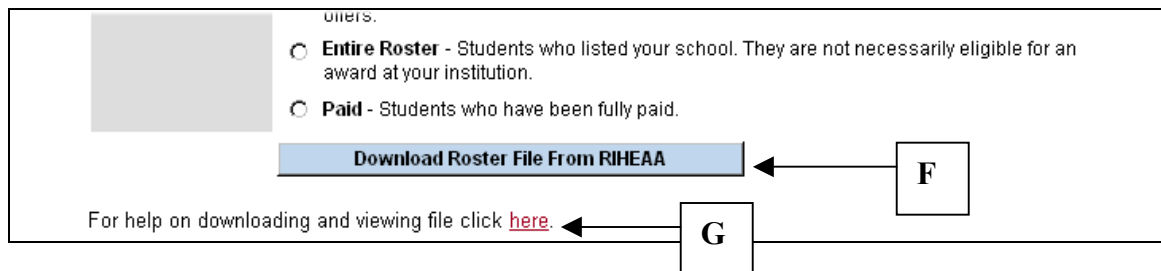
63

- a. **Not Verified-Eligible** - You must complete verification for all students listed as “Not Verified-Eligible”. Students listed in other categories are for reference/reporting purposes only.
- b. **Not Verified-Ineligible** - Students who listed your school but are not eligible for a RIHEAA administered award for your institution based on program eligibility requirements.
- c. **Verified Eligible** - Students you have already verified as enrolled and eligible for an award.
- d. **Verified Ineligible** – Students who listed your school but are not eligible for a RIHEAA administered award at your institution because either: 1) you indicated a reason for ineligibility; 2) another institution has verified eligibility; 3) student accepted a RIHEAA administered award for attendance at another institution; or 4) the student declined all award offers.
- e. **Entire Roster** - Student who listed your school. They are not necessarily eligible for an award at your institution
- f. **Paid** - Students who have been fully paid.
- g. **Code D** – Students who you have marked as pending review by your school to determine financial need.
- h. **Specific Code** – Filter by a specific code.

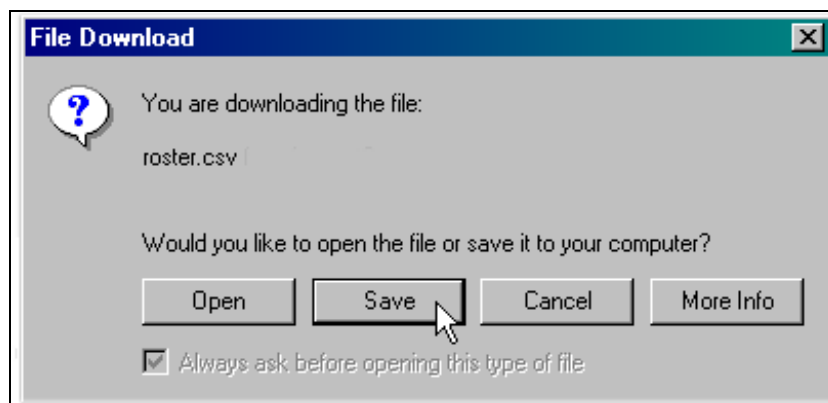
4. After you have set your **Roster Filtering Options**, click on the **Download Roster File from RIHEAA** button. (Example F)



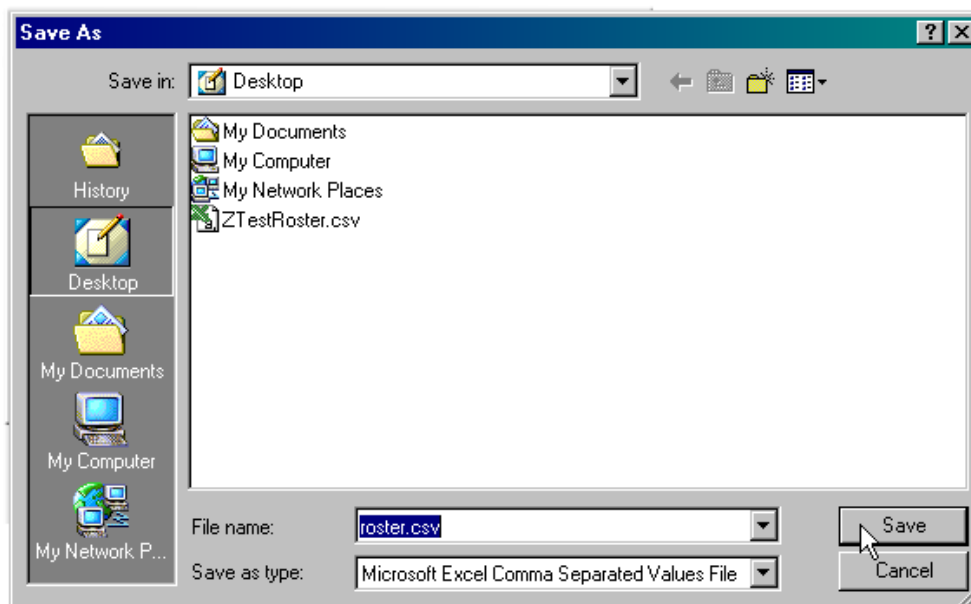
For Help on downloading and viewing the roster file click the help link. (Example G)



5. Click the **Save** button to continue with the download. See the following example:



6. Choose a folder in which to save your **Roster File**. Click the **Save** button. See the following example:



Sending a File to RIHEAA

Send Test File vs. Live File

Reasons why you may want to **Send a Test File to RIHEAA**:

- To become more familiar with the process of sending a file to RIHEAA without verifying any students or updating any of RIHEAA's data;
- To verify that your file has been exported correctly; or,
- To test students for eligibility without actually verifying the student's enrollment.

The **Send Test File to RIHEAA** and **Send Live File** processes are very similar. The following documentation will describe the process of sending each file.

1. Click **Send File to RIHEAA** button from the **Side Menu Bar** (Example A), or the **Electronic Data File Transfer Process** link from the **Main Menu** (Example B).

The screenshot displays the RIHEAA system interface. On the left is a vertical side menu bar with sections: 'Data File Transfer' (containing 'Data File Transfer', 'Receive Roster File', and 'Send File to RIHEAA'), 'Students' (containing 'Search for' and 'Add Student'), 'My Options', 'Main Menu' (containing 'User Agreement', 'Change Password', 'Help', and 'Exit/Logoff'), and 'User Information' (containing user details for John Smith at STATE COLLEGE, a password expiration date of 8/30/2003, a summary for the 2003-2004 1st Semester, and a state grant summary showing payments due of \$1825 and refunds due of \$0). The main content area on the right is titled 'STATE COLLEGE' and contains sections: 'Manage Budgets' (View or update the RIHEAA database's records concerning the cost of attendance for STATE COLLEGE.), 'Manage Academic Period' (View or update the RIHEAA database's records concerning the academic periods for STATE COLLEGE.), 'Manage User Accounts' (Manage the RIHEAA Secure Site user login accounts for STATE COLLEGE.), 'Roster' (containing 'Verify Roster Online' and 'View or Print Roster'), and 'Data File Transfer' (containing 'Electronic Data File Transfer Process' and 'Receive Roster File from RIHEAA'). A box labeled 'A' with an arrow points to the 'Send File to RIHEAA' button in the side menu bar. A box labeled 'B' with an arrow points to the 'Electronic Data File Transfer Process' link in the main menu.

2. To send a **Test File** to RIHEAA, click on “**Send a Test File to RIHEAA.**” (Example C)
3. To send a **Live File** to RIHEAA, click on “**Send a Live File to RIHEAA.**” (Example D)



The RIHEAA Online Database will display all **Live Files** that have already been sent to RIHEAA. (Example E) Only **Live Files** are logged; **Test Files** are *not* logged.

Choose Upload Type



Send a Test File to RIHEAA

Send a test file to process a file without updating RIHEAA's database. You will still be able to download the resulting report files, but no information will be affected in the RIHEAA Secure Site.



Send a Live File to RIHEAA

Send a live file when you feel comfortable that your data is correct. RIHEAA's database will be updated to reflect the information that you send.

You have sent 6 live file(s) to RIHEAA for the 2003-2004 1st Semester .

Date / Time	File Name	Eligible Students	Ineligible Students
7/2/2003 10:46:40 AM	roster3.csv	0	0
7/2/2003 10:51:25 AM	roster3.csv	0	0
7/2/2003 10:54:07 AM	roster3.csv	0	0
7/2/2003 10:57:10 AM	roster3.csv	0	0
7/9/2003 6:09:41 PM	roster.csv	0	0
7/22/2003 11:46:09 AM	roster4.csv	0	0

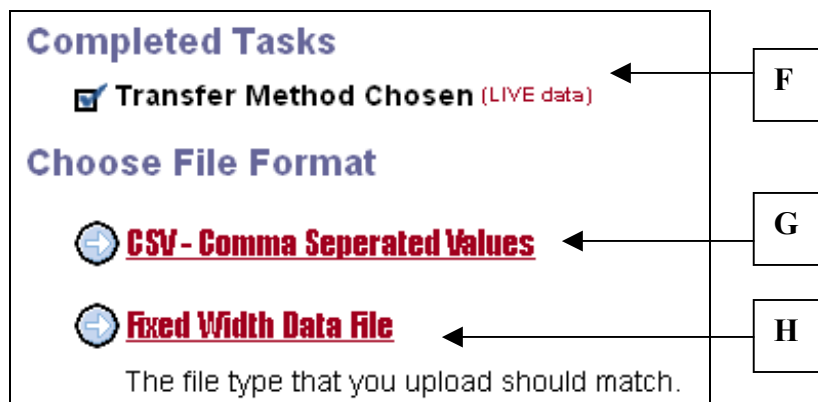
E

Choose File Type

Prior to **Sending your Roster File to RIHEAA** you will need to **Choose the File Type**.



As you work through the preparation of **Sending a Roster File to RIHEAA**, the top of each screen will display your “**Completed Tasks**” to verify the options you have selected. (Example **F**)



1. To send a **CVS-Comma Separated Values File** to RIHEAA, click on “**CSV-Comma Separated Values.**” (Example **G**)
2. To send a **Fixed Width Data File** to RIHEAA, click on “**Fixed Width Data File.**” (Example **H**)



If you are not sure which file format you are using, a **Comma Separated Values (CSV)** file name usually ends in “**.csv**” and commas separate the information in the file. A **Fixed Width File** file name usually ends in “**.dat**” and a fixed amount of spaces separate the information in the file.

Finding Your File

1. If you know the location of the file you would like to send to RIHEAA, type the file location into the box provided. (Example I)

I

Completed Tasks

☒ **Transfer Method Chosen** (LIVE data)

☒ **File Format Chosen** (CSV)

Send Student Information to RIHEAA

Please locate the file to send:

Click on the <Browse> button below and locate the file you would like to send. Once you find the file and select it, click on the <Open> button. After you have located the file, click the <Send> button.

Browse...

Send

J

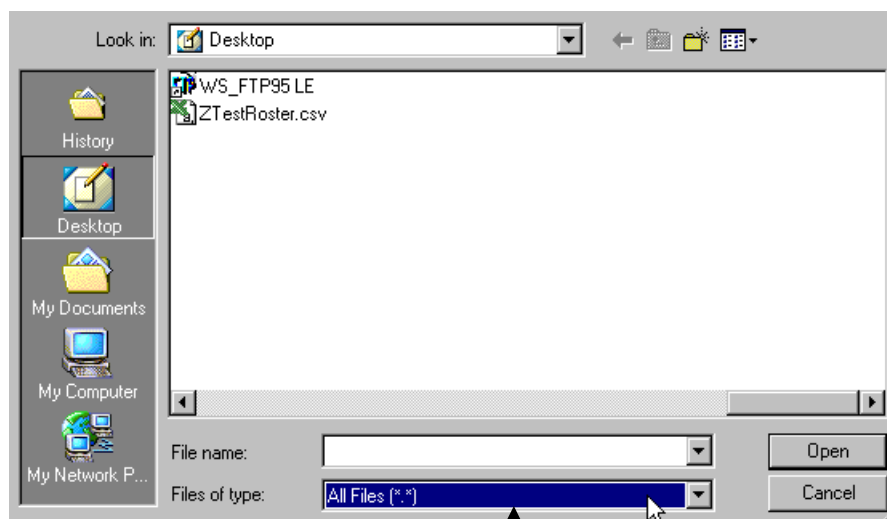
2. If you do not know the location of your file, click on the “**Browse**” button. (Example J)



Netscape Users: Be sure to select “**All Files (*.*)**” from the “**Files of type**” drop-down box. (Example K)

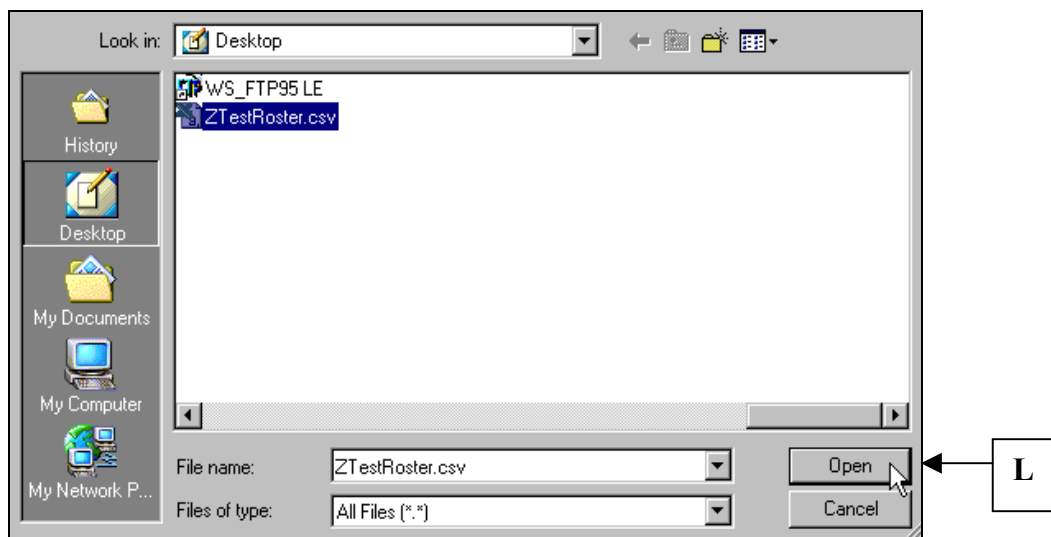


Depending on your Internet browser, your screen may vary from the following example.



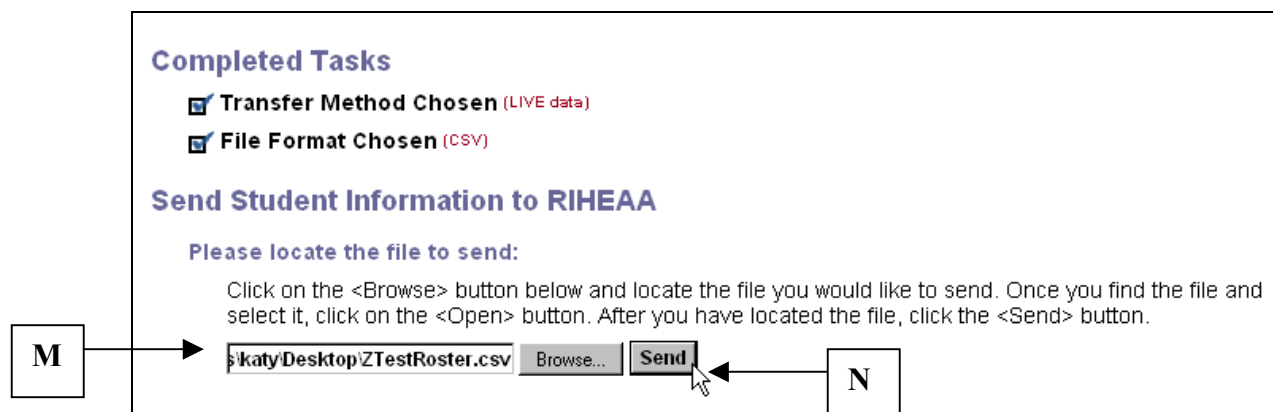
K

3. Once you find the file you want to send to RIHEAA, select the file, and then click on the “**Open**” button. (Example L)



Your file name and location will be entered into the text box.
(Example M)

4. Once you have either typed in the file location or have chosen the file to upload via the “**Browse**” button, click on the “**Send**” button to upload your file to RIHEAA. (Example N)



If your browser is **JavaScript** enabled, (such as more recent versions of Internet Explorer or Netscape), you will see on-screen verification of the file transfer process. Note the following example.



Confirming the File Format

The next step in the process is to **confirm** that the **file format** matches the **required file format**. A common error in many file transfers is a discrepancy between the file and the expected file format. One character can mean the difference between the last name “**Smith**” and “**Mith**.” Choosing the incorrect file format can cause incorrect data.



You can use the **Completed Tasks** to verify where you are in the process. (Example **O**)

1. Click the **View File Format to Confirm File Format** option. (Example **P**)


Completed Tasks

- ☒ Transfer Method Chosen (LIVE data)
- ☒ File Format Chosen (CSV)
- ☒ File Sent (ZTestRoster.csv - 19k)

O

Confirm File Format

As a precaution, you are required to **confirm the file format** of the file you just uploaded. Click the link below to view the file format.

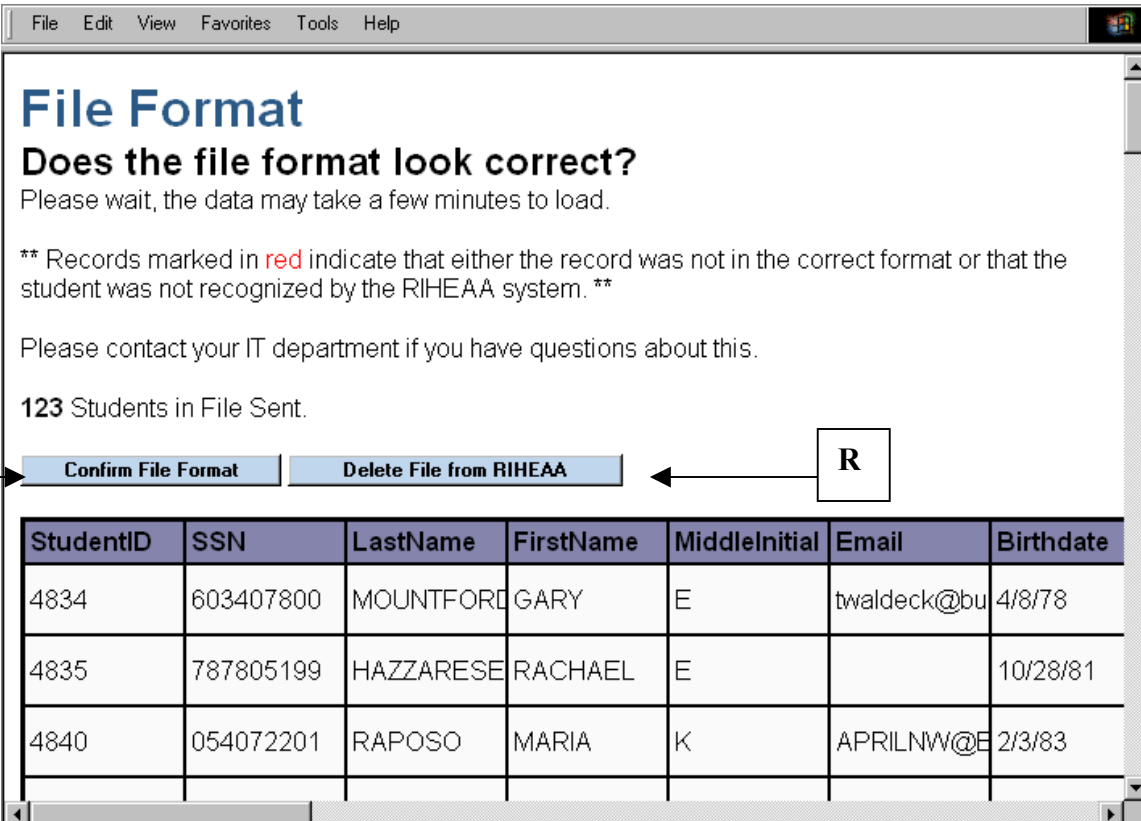
 **[View File Format to Confirm Format](#)**

P

You are currently set up to use the **CSV** file format. The file you sent contains **123 records** that will be processed by the RIHEAA Secure Site.

The data from the file you sent to RIHEAA will appear on the screen. Note: The data may take a few minutes to appear. If you sent a file with 2000 records, this screen may take a while to load.

1. If your data appears *correct*, click the “**Confirm File Format**” button. (Example Q)
2. If your data appears *incorrect*, click the “**Delete File from RIHEAA**” button. (Example R)



File Format

Does the file format look correct?

Please wait, the data may take a few minutes to load.

** Records marked in **red** indicate that either the record was not in the correct format or that the student was not recognized by the RIHEAA system. **

Please contact your IT department if you have questions about this.

123 Students in File Sent.

Q **Confirm File Format** **Delete File from RIHEAA** R

StudentID	SSN	LastName	FirstName	MiddleInitial	Email	Birthdate
4834	603407800	MOUNTFORD	GARY	E	twaldeck@bu	4/8/78
4835	787805199	HAZZARESE	RACHAEL	E		10/28/81
4840	054072201	RAPOSO	MARIA	K	APRILNW@E	2/3/83



If you **Delete File from RIHEAA**, you will *not* have updated any records. You may begin the **Send the File to RIHEAA** process again.



Students that are marked in red did not pass at least one of the RIHEAA verification checks. Those students will not be updated in the RIHEAA database and will not be recalculated.

Processing Awards

If your file format is correct, you are now ready to process the file that you uploaded to RIHEAA.


1. Click on the “**Process Awards**” option. (Example S) Your information has been sent to RIHEAA for recalculation.

Completed Tasks

- ☒ **Transfer Method Chosen** (LIVE data)
- ☒ **File Format Chosen** (CSV)
- ☒ **File Sent** (ZTestRoster.csv - 19k)
- ☒ **File Format Confirmed**

Award Calculation Process

The system is now ready to calculate the awards for the students you've uploaded. Click on the link below to continue.

 **Process Awards**

S

←

2. To view and download the results the file must complete processing. Once the file has completed processing, it will show up on your taskpad for review. (Example T)

Award Recalculation In Progress

Awards recalculation is in progress for all institutions on the server.
There are 59 students left to calculate.
Some award amounts may be incorrect until calculations are complete.

File Not Yet Processed

Your file has not been fully processed yet.

Please check back soon. When the file has completed processing, it will show up on your taskpad for review.

←

T

Attention!



Depending on how many students were submitted in the file, you may be able to view the results immediately. A notice will be displayed in your **To Do List** once you are able to access the **results page**. (Example U)

Online Database

Search for Student

Institutional Setup

Institutional Info

Academic Period

Manage Budgets

User Accounts

Roster

Verify Roster Online

View or Print Roster

Scholarship and Grant System

2003-2004

Change Active Year

You are currently working with the 2003-2004 academic year. To work with a different year, choose the year that you want to work with and click the <Go> button.

Award Recalculation Complete

All awards for STATE COLLEGE have been recalculated.

To-Do List

1) [Review File Transfer Results](#) (ZTestRoster.csv sent on 8/12/2003 9:41:20 PM)

2) Please Verify Your Students:
[Verify Roster Online](#)
[File Verification](#)

U

Download Result Files

After the awards have finished processing, you will have the option to **Download the Results Files**. These two result files are **Eligible Students**, and **Ineligible Students**. They are both available in **CSV**, and **Fixed Width Data** format.

1. To **Download a Result File**, click on the corresponding hyperlink. (Example V)



If a category is empty after the award recalculation is complete, a hyperlink will **not** exist to download the **Result File**. (Example W)

W

Operation Complete

Your file has been saved and updated in RIHEAA's database.

Receive Results from RIHEAA

These files were produced as a result of the award calculation procedure.

[2003224223734.csv](#) [2003224223734.dat](#) - Eligible Students (105).

No files to download for this category, Ineligible Students (0).

[Remove File Review from To Do List](#)

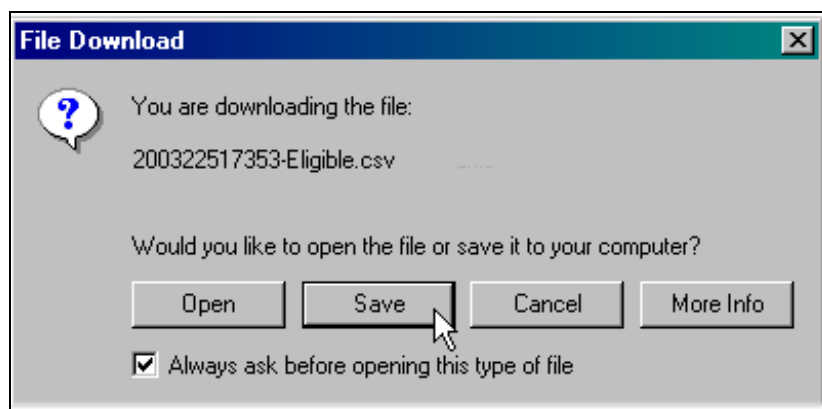
Note: You will not be able to download any result files from this file transfer after you remove this File Review from your taskpad.

Balance Due:

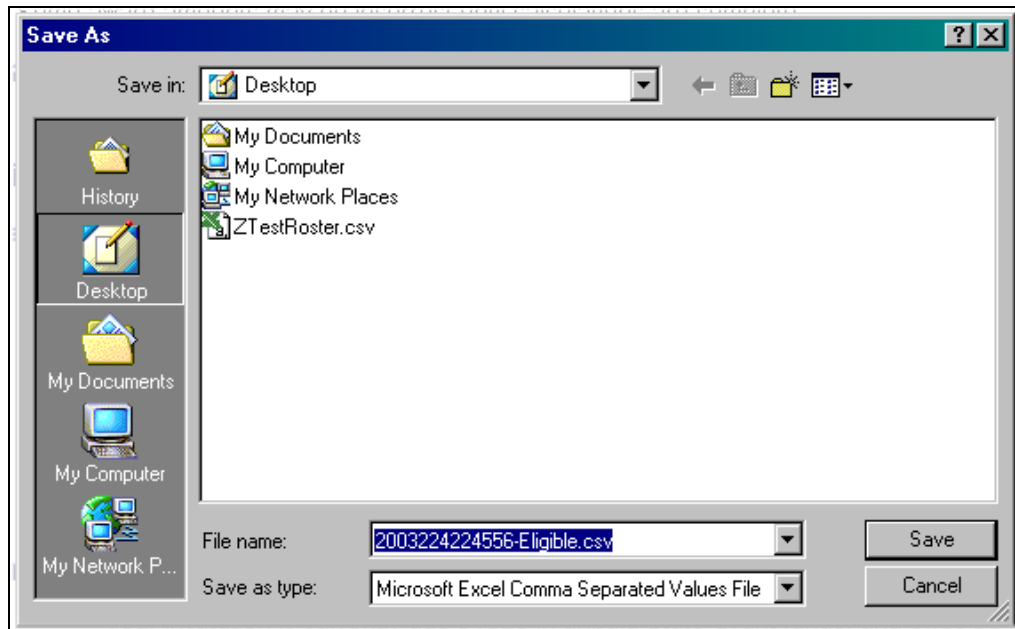
- ◆ Your institution is currently due \$1825 in unpaid State Grant funds, and owes \$0 in overpaid State Grant funds.
- ◆ Your institution is currently due \$2068 in unpaid Childrens Crusade funds, and owes \$0 in overpaid Childrens Crusade funds.
- ◆ Your institution is currently due \$0 in unpaid Academic Promise funds, and owes \$0 in overpaid Academic Promise funds.

V

2. Click the **Save** button to continue with the download. See example below:



3. You need to choose a folder in which to save your **Result File**. Click the **Save** button. See the following example:




4. Once you have saved the **Result Files**, you can remove this item from your **To Do List**. Click the **Remove File Review from To Do List** link. (Example X)




Note: Once you remove this from your **To Do List**, you cannot download the **Result Files** from this **File Transfer**

Receive Results from RIHEAA

These files were produced as a result of the award calculation procedure.

 [2003224223734.csv](#) [2003224223734.dat](#) - Eligible Students (105).

 No files to download for this category, Ineligible Students (0).

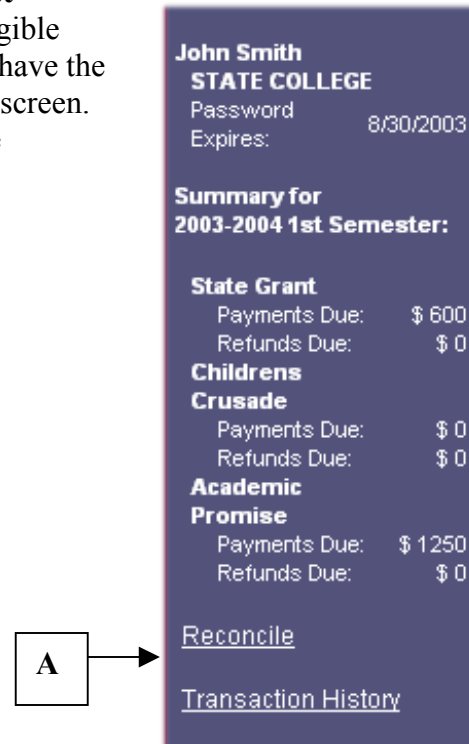
 [Remove File Review from To Do List](#)



Note: You will not be able to download any result files from this file transfer after you remove this File Review from your taskpad.

Request Payment

Once you have verified students you can then **request payments** for any students that are in the verified eligible status. Immediately after verifying students you will have the option to **request payment** from the **Reconciliation** screen. You may also **request payment** at any time from the **Reconcile** link on the side menu bar. (Example A)



How to Request Payment

- **Balance Due** section, this section will provide your institution with a view of funds due and owed to your institution by program. (Example B)
- **Payment Verification** section, this section breaks down the different statuses through the payment process. (Example C)
 - **Program** – Lists each program RIHEAA administers and the associated balances.
 - **Verified Since Last Transaction** – Represents the total amount due to verified eligible students who have not received a full payment.
 - **Award Reductions Since Last Transaction** – Represents the total amount of award reductions that have not been refunded.
 - **Donated Scholarships Since Last Transaction** – Represents the total amount due to verified eligible students that has been donated by your institution. (Note: This column applies to Children's Crusade only.)
 - **This Transaction** - This check box allows you to request payment if there is a payment or a refund due.

User Accounts

Roster

Verify Roster Online

View or Print Roster

Data File Transfer

Data File Transfer

Receive Roster File

Send File to RIHEAA

Students

Search for

Add Student

My Options

Main Menu

User Agreement

Change Password

Help

Exit/Logoff

User Information

Victor Gaspar
UNIVERSITY OF RHODE ISLAND
Password Expires: 4/4/2004

Summary for 2003-2004 1st Semester:

State Grant
Payments Due: \$ 3975
Refunds Due: \$ 0

Childrens Crusade
Payments Due: \$ 6204
Refunds Due: \$ 0

Academic Promise
Payments Due: \$ 0
Refunds Due: \$ 0

Balance Due:

- ◆ Your institution is currently due \$3975 in unpaid State Grant funds, and owes \$0 in overpaid State Grant funds.
- ◆ Your institution is currently due \$6204 in unpaid Childrens Crusade funds, and owes \$0 in overpaid Childrens Crusade funds.
- ◆ Your institution is currently due \$0 in unpaid Academic Promise funds, and owes \$0 in overpaid Academic Promise funds.

Payment Verification:

Program	Verified Since Last Transaction	Award Reductions Since Last Transaction	Donated Scholarships Since Last Transaction	This Transaction
State Grant	\$ 3975	\$ 0	n/a	<input type="checkbox"/> Request \$ 3975 Payment
Childrens Crusade	\$ 6204	\$ 0	\$ -6204 (details)	<input type="checkbox"/> Reconcile Funds
Academic Promise	\$ 0	\$ 0	n/a	Reconciled

****Payments or refunds cannot be processed while students are being calculated.****

[Request Selected Payments/Refunds](#) 1 students in the queue. ([Refresh](#))

To continue working with your roster, select one of the menu options on the left, or choose one of the options below.

[Return to Main Menu](#)

[View / Edit Roster](#)

B

C

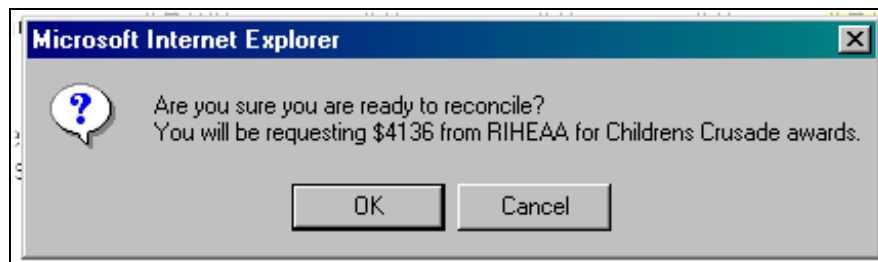
1. To **Request Payment**, check the box in the **This Transaction** column for the program for which you want to request payment.
2. Click the **Request Selected Payment/Refunds** button to submit. (Example D)

Academic Promise \$ 0

[Request Selected Payments/Refunds](#)

D

3. Once you have clicked the **Requested Selected Payments/Refunds** button, a pop-up box will be displayed to verify the amount you are requesting. If this amount is correct click the “OK” button. See the example below:



Transaction History

This screen will display the history of all the transactions your institution has completed for the active term.

The different columns that make up this screen are as follows:

- **Request ID** – This column displays the unique identifier assigned by the Scholarship and Grant System. This ID is created by Date, Time, School Code, and Program.
- **Transaction Type**- This column displays the type of transaction. This would state either Payment or Refund.
- **Amount** – This is the amount of the transaction.
- **Status** – This column states the status of the transaction. This would display Pending, Paid or Refunded.
- **Check Date** – This column displays the date the check was processed by RIHEAA.
- **Check Number** – This column displays the check number that was processed.
- **Download** - This column will display a “**Voucher**” link. The **Voucher** allows you to download all of the students that were **paid, pending or refunded** within that transaction. (Example E)



To download all of the students for the active year that have been paid, click on the **Download Entire Transaction History As CSV File link**. (Example F)

Transaction History

[Download All Transactions As CSV File](#) ← **F**

Request ID	Transaction Type	Amount	Status	Check Date	Check Number	Download
2003-10-07 11:46:29 003414 State Grant	Payment	\$3,975.00	Pending	Pending	Pending	Voucher ← E

To continue working with your roster, select one of the menu options on the left, or return to the main menu.

[Return to Main Menu](#)

For help on downloading and viewing CSV files, click [here](#).

Help

If you require **Help** at anytime while using the Scholarship and Grant System, you may use the **Help** option provided. There are two options available to request **Help**.

1. Click the “**Help**” button on the “**Menu Bar**”. This option is available on every screen throughout the Scholarship and Grant System. (Example A)
2. Click the “**Help**” link on the “Main Menu Screen”. (Example B)

The screenshot displays the RIHEAA Secure Site Main Menu. On the left is a vertical navigation bar with a dark blue background and white text. It includes sections for 'Main Menu' (with links: User Agreement, Change Password, **Help**, Exit/Logoff), 'User Information' (showing user details for Jane Smith), 'Summary for 2003-2004 1st Semester' (listing financial data for State Grant, Childrens Crusade, and Academic Promise), 'Transaction History', and 'User Manual' (with an Adobe Acrobat Reader icon). The main content area has a white background and a dark blue header bar. It contains several sections: 'Roster' (with links: [Verify Roster Online](#), [View or Print Roster](#)), 'Data File Transfer' (with links: [Electronic Data File Transfer Process](#), [Receive Roster File from RIHEAA](#)), 'Students' (with links: [Search for Student](#), [Add Student](#)), and 'My Options' (with links: [User Agreement](#), [Change Password](#), [Help](#), [Exit / Logoff](#)). Callout 'A' is a black box with the letter 'A' and an arrow pointing to the 'Help' link in the left navigation bar. Callout 'B' is a black box with the letter 'B' and an arrow pointing to the 'Help' link in the 'My Options' section of the main content area.

Main Menu
User Agreement
Change Password
Help
Exit/Logoff

User Information
Jane Smith
RI School of Software Design
Password: 10/18/2003
Expires: 12:12:35 PM

Summary for 2003-2004 1st Semester:

State Grant	
Payments Due:	\$ 0
Refunds Due:	\$ 0

Childrens Crusade	
Payments Due:	\$ 0
Refunds Due:	\$ 0

Academic Promise	
Payments Due:	\$ 0
Refunds Due:	\$ 0

Transaction History

User Manual
Get Acrobat Reader

Manage the RIHEAA Secure Site user login accounts for RI School of Software Design.

Roster
[Verify Roster Online](#)
Verify your students, name, amounts, Full/Part time...
[View or Print Roster](#)
View students and print the roster.

Data File Transfer
[Electronic Data File Transfer Process](#)
Send File to RIHEAA's database with your information. This option will send your student information to the **RIHEAA Secure Site**. Your student information will be processed as soon as it is received, and you may confirm the results online.
[Receive Roster File from RIHEAA](#)
Download a roster file from RIHEAA.

Students
[Search for Student](#)
Search for students using first name, last name, or social security number.
[Add Student](#)
Add students to your roster.

My Options
[User Agreement](#)
View the User Agreement for the RIHEAA Secure Site.
[Change Password](#)
Change the password that you use to log in to the RIHEAA Secure Site. Passwords expire after 180 days, so you should change your password regularly.
[Help](#)
Directly access RIHEAA's **help desk** and contact information.
[Exit / Logoff](#)
Exit the Scholarship and Grant System

- Once you choose **Help**, the following screen will be displayed.

riheaa Assisting Rhode Island's Students...
Rhode Island Higher Education Assistance Authority ...Investing in Rhode Island's Future

HELP DESK

Your Name:

Email Address:

Phone Number:

Programs:

How can we help you?

May I Help You?

Your personal support representative:
Michael Joyce

Email Assistance:
mjoyce@riheaa.org

Phone Assistance:
(401) 736-1172

This form allows you to request **Help** from RIHEAA by sending an email to the Program Officer.

1. Complete the form with the required fields. (Example C)
2. Once completed, **click** the “**Submit**” button to email your request to RIHEAA. (Example D)
3. If you would like to cancel your request for **Help**, **click** the “**Cancel**” button. This will **not** forward an email to RIHEAA. (Example E)

riheaa Assisting Rhode Island's Students...
Rhode Island Higher Education Assistance Authority ...Investing in Rhode Island's Future

HELP DESK

Your Name:

Email Address:

Phone Number:

Programs:

How can we help you?

May I Help You?

Your personal support representative:
Michael Joyce

Email Assistance:
mjoyce@riheaa.org

Phone Assistance:
(401) 736-1172

C (bracketed around input fields)

E (arrow pointing to Submit button)

D (arrow pointing to Cancel button)

If the request was successful a new window will be displayed stating: “*Your request has been submitted.*” To close this window, click the “**Close Window**” button. (Example F)



riheaa Assisting Rhode Island's Students...
Rhode Island Higher Education Assistance Authority ...Investing in Rhode Island's Future

HELP DESK

Your request has been submitted.

You will receive a reply via e-mail or phone as soon as possible.

Thank you for your questions and/or comments.

Close Window

F

May I Help You?

Your personal support representative:
Michael Joyce

Email Assistance:
mjoyce@riheaa.org

Phone Assistance:
(401) 736-1172

Rhode Island Higher Education Assistance Authority

Verification Roster Data File Format Guide Introduction

Schools are given the option to process student awards automatically using information from their own in-house financial aid software. RIHEAA recommends that only schools with large verification rosters use this method, as it will require assistance from your in-house IT staff. Should you decide to not process your rosters automatically, an easy to use web-based interface for completing verification is available.

Since automatic processing often requires that your IT staff member write programming code, those interested in automatic processing should contact their IT staff immediately and set a realistic timeline for going live. Be sure to forward this document to the IT professional who will be working on the project and put them in touch with RIHEAA for any technical assistance they may need.

Change History

Date	Made By	Change
10/15/03	JDG	<ul style="list-style-type: none">• CSV File now contains a header row. Fixed-width file does not.• Date format standardized to MM/DD/YYYY with leading zeros.• Currency values are right-justified within column space for fixed-width format.• Currency values contain a period to delimit dollars from cents.• Dash delimiters are acceptable in the CSV format when uploading file to RIHEAA (for Microsoft Excel compatibility).• Academic Period field is now a single digit number.• Full/Part time status is now listed as “Full” or “Part”• RIHEAA EFC field has been removed and replaced with filler space.

Functional Description

The automatic roster processing method works as follows:

- 1) Financial Aid Officer or IT staff member downloads a verification roster file from the RIHEAA web system. Files will be available in either comma-separated or fixed-width format.
- 2) The IT Staff member must write a custom piece of software that will compare values in the RIHEAA verification file with data contained in the in-house financial aid software system and update fields in the RIHEAA data file as appropriate.
- 3) Once the verification file has been updated, the IT staff member or Financial Aid Officer uploads the modified data file using the RIHEAA web system. RIHEAA's

system will recalculate student awards as appropriate and allow the FAO to request payment for the students who were verified.

- 4) FAO or IT staff member may download a new roster following recalculation to determine which student awards have been changed.

Processing Rules

- Multiple successive updates to a student award record are acceptable.
- Incomplete award records will be accepted. Blank (null) field values will be ignored and student award record will continue to appear on the next “not verified” roster download until that record is complete.
- It is not possible to verify GPA requirements for Academic Promise using a data file. All other data for that student’s academic promise award record may be verified via file, but the award record will not be considered verified and complete until the FAO updates this value via the web interface.

File Layout

The file layout for both CSV and Fixed Width files is defined by the grid shown below:

	CSV	Fixed Width			
FieldName	Col	Starting Character	Ending Character	Length	Updateable
RIHEAASStudentID	1	1	10	10	
SSN	2	11	19	9	
LastName	3	20	44	25	X
FirstName	4	45	56	12	X
MiddleInitial	5	57	57	1	X
Email	6	58	107	50	X
BirthDate	7	108	117	10	X
SchoolYear	8	118	126	9	
AcademicPeriodID	9	127	151	25	
Budget	10	152	176	25	X
Enrolled	11	177	201	25	X
Program	12	202	225	24	
CalculatedAward	13	226	239	14	
SchoolRequestedAward	14	240	253	14	X
EligibilityCodes	15	254	278	25	X
Filler	16	279	293	15	

EFC	17	294	308	15	X
DependantStatus	18	309	309	1	X
AmountPaid	19	310	323	14	
Filler	20	324	362	39	

Fixed-Width Format

The fixed-width format file will be available as an ASCII text file with the following characteristics/restrictions:

- No header information or header row will be present. If a header row is found, it will be ignored by the system.
- Each row represents an award offer for a given student during a given academic term (semester, quarter, etc.)
- Each column represents a data field in that award offer row.
- Each row will be terminated by a carriage return and line feed character in accordance with common Windows standards and practices.
- Empty or null fields will be padded with space characters.

Comma-Separated Value (CSV) Format

The verification file will also be made available in a comma-separated value (CSV) format. The order of the columns in the CSV file will be identical to the order of the columns in the fixed-width file (see above). The CSV file will have the following characteristics/restrictions:

- A header row will be present for human-readability. Header row is optional in the return file. If one is found, it will be ignored by the system.
- Each row represents an award offer for a given student during a given academic term (semester, quarter, etc.)
- Each column represents a data field in that award offer row.
- Each row will be terminated by a carriage return and line feed (CRLF) in accordance with common Windows standards and practices.
- Each column/field will be delimited by a comma character with no delimiter at the end of the row
- Empty or null fields will contain no characters between the delimiters
- Columns/Fields are not quoted.
- Commas will not appear within the context of any data field

Field Descriptions

RIHEAASStudentID

This is a unique student ID defined by RIHEAA's system. This field is read-only and must be present to properly identify the student on import.

SSN

A 9-digit numeric representation of the student's social security number. Export file will not contain dashes. For Microsoft Excel compatibility, dash delimiters will be allowed in the CSV format when the file is uploaded to RIHEAA.

LastName

Student's last name, all uppercase letters. Note: Name may have been truncated by the Federal Processing Center. Field is updateable.

FirstName

Student's last name, all uppercase letters. Note: Name may have been truncated by the Federal Processing Center. Field is updateable.

MiddleInitial

Student's middle initial, all uppercase letters. Blank if unknown. Field is updateable.

Email

Student's email address, if provided to RIHEAA. Field is updateable.

BirthDate

Student's date of birth. Data provided by RIHEAA will be in the following format:
MM/DD/YYYY

Zero-padding will be used on MM and DD in the fixed-width format to preserve character location.

When sending the file back to RIHEAA, formats accepted are as follows:

mm/dd/yyyy mm-dd-yyyy Example: 07/03/1982

mm/dd/yy mm-dd-yy Example: 07/03/82

m/d/yy m-d-yy Example: 7/3/82

m/d/yyyy m-d-yyyy Example: 7/3/1982

yyyy-mm-dd Example: 1982-07-03

SchoolYear

The academic/awarding year for the student award record in question. The award year will be specified as a four-digit year range, separated by a hyphen character. For example: 2001-2002. This field is read-only.

AcademicPeriodID

A read-only field indicating the academic term for which this award is being offered. RIHEAA will output a single digit indicating the academic term as follows:

1,2 for Semester Schools

1,2, or 3 for Trimester Schools

1,2,3, or 4 for Quarter Schools

Budget

The program budget the student is enrolled under. Budget names are entered into the web-based system by the Financial Aid Officer. The budget name string in this field must match exactly the name provided by the FAO. RIHEAA suggests that FAO's collaborate with IT professionals to develop an appropriate naming schema. Field is updateable.

Enrolled

Value indicating an eligible student's enrollment plans. Acceptable strings are "Full" or "Part". For the purposes of RIHEAA's awarding algorithm, enrollment should be determined as follows:

Full Time = “Full”
 Half or ¾ Time = “Part Time”
 Less than Half Time = Mark student as code G - “Enrolled Less than Half Time” (see below)

If student is marked with code G, the value of the Enrolled field will be ignored by RIHEAA’s system.

Program

A string value indicating the scholarship or grant award program for which this award offer row applies. Possible values are:

Academic Promise
 State Grant
 Childrens Crusade

Field is read-only.

CalculatedAward

A numeric field indicating the calculated value of the award being offered. Value will be in standard “money” two-digit decimal format, for example 266.67 and will be right-justified and left-padded in the fixed-width format. Field is read-only.

SchoolRequestedAward

A field where the school may override the student’s award due to one or more of the following situations:

- Full need has been met
- Student withdrew partway through an academic term and a partial payment/refund is necessary.
- Other reason by way of professional judgment.

Upon file upload and recalculation, this field will override the Calculated Award unless the value is greater than the calculated award. Changes to this field must be made in accordance with the rules outlined in RIHEAA’s participation agreement. Field is updateable.

Value must be in standard “money” two-digit decimal format, for example 266.67 and must be right-justified and left-padded in the fixed-width format.

EligibilityCodes

An alphanumeric code indicating the student’s eligibility for the specified program. The system accepts one or more codes within the same field. No delimiters are necessary and non-alphanumeric codes will be ignored. Codes are defined as follows:

A	Meets All Eligibility Requirements
B	Has Financial Need Less Than Award
C	Is Withdrawn but Charged Tuition
D	Is Pending Review of File To Determine EFC and/or Financial Need for Grant/Scholarship
E	Has No Financial Need
F	Has Not Enrolled

G	Has Enrolled Less than Half Time
H	Is In Program of Less than 600 Clock Hours
I	Is Not Matriculating
J	Is On Leave of Absence
K	Is Not Making Satisfactory Progress
L	Is Considered a Resident of a State Other than RI
M	Has Bachelor's Degree
N	Is a Graduate Student
O	Is In Default of a Federal Student Loan
P	Owes a Refund on a Pell Grant or SEOG
Q	Does Not Meet Selective Service Requirements
R	Is Ineligible Due to a Drug Conviction
V	Is Deceased
W	Is Not Planning to Attend. Student responded to RIHEAA's request for enrollment plans.

Field is updateable and required by RIHEAA for rows in the file.

EFC

A field indicating the student's EFC as calculated on the FAFSA. An FAO may change this value for reasons of professional judgment. In this case, the adjusted EFC will appear on the next file download that contains this student. Value will be in standard "money" two-digit decimal format, for example 266.67 and will be right-justified and left-padded in the fixed-width format. Field is updateable.

DependantStatus

A single-character field indicating the student's dependency status. I = "Independent", D = "Dependant". Field is updateable.

AmountPaid

A currency value indicating the dollar amount paid for this record. Field is null if no payment has yet been made. Value will be in standard "money" two-digit decimal format, for example 266.67 and will be right-justified and left-padded in the fixed-width format.
Field is read-only.

Filler

Blank filler space reserved for future additions to the file format.

Getting Help

Technical questions regarding the file format or upload/download process may be directed to the Scholarship and Grant Division by phone at (401) 736-1170 or by email at grants@riheaa.org. Our staff programmer will be more than happy to assist you.