# MASSAid School User Guide

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1 Welcome to MASSAid

1.1 Features
MASSAid is a full-service Internet-based grant and scholarship management system. MASSAid manages the Massachusetts Office of Student Financial Assistance grant and scholarship aid programs including, but not limited to, the following processes:

- Processing student applications
- Verifying student application information
- Determining eligibility and selecting awardees
- Notifying students of award status
- Updating student applications
- Supporting school certification of awards
- Maintaining school profiles
- Maintaining rules for processing of programs
- Generating reports
- Providing email communication to users
- Disbursing award payments to schools
- Processing payment adjustments and cancellations

1.2 System Requirements
MASSAid runs on the following operating systems:

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

MASSAid has the following hardware and software requirement:
<table>
<thead>
<tr>
<th>Equipment</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC</td>
<td>133 MHz or faster Pentium</td>
</tr>
<tr>
<td>Monitor</td>
<td>Color SVGA</td>
</tr>
<tr>
<td>RAM</td>
<td>32 MB or higher</td>
</tr>
<tr>
<td>Disk drive</td>
<td>50 MB or higher</td>
</tr>
<tr>
<td>Printer</td>
<td>Windows-compatible printer</td>
</tr>
<tr>
<td>Modem*</td>
<td>Hayes-compatible 56K baud rate modem or higher</td>
</tr>
<tr>
<td>Internet access</td>
<td>Connection to the Internet</td>
</tr>
<tr>
<td>Browser</td>
<td>Internet Explorer 6.0 or higher</td>
</tr>
<tr>
<td>JavaScript</td>
<td>JavaScripting must be enabled</td>
</tr>
</tbody>
</table>

*Required for Internet access

Follow the steps below to insure JavaScript is enabled:

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

### 1.3 User Roles

School users are assigned “Administrator,” “Update” or “View Only” security level for each aid program by agency personnel who have been designated a "User Administration" users. A user can be assigned varying security levels for each aid program.

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

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

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

### 1.4 Login and Account Management

School users navigate to MASSAid through the agency website. Upon selecting the MASSAid link, the Log In screen is displayed.
1.4.1   Login

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

From the Log In page, follow these steps:

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

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

2.1.1   Do not close this screen, a registration code is sent to the email address that is listed on your user profile (if you close this screen you will need to start over).

2.1.2   Once the registration code is received via email, copy and paste (or type) it in the Registration Code field.

2.1.3   If using a non-public computer (your home or office), select the check box to register your computer.

2.1.4   Click [Continue].
2.2 If you have not selected a personal image, the Personal Image Selection screen will display.

<table>
<thead>
<tr>
<th>Personal Image Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Personal Image helps you know for sure that you are at the valid site. Every time you sign in, you will see your Personal Image after you enter your User Name.</td>
</tr>
<tr>
<td>Please select a Personal Image:</td>
</tr>
<tr>
<td><img src="image1.png" alt="Image 1" /></td>
</tr>
<tr>
<td><img src="save.png" alt="Save" /></td>
</tr>
</tbody>
</table>

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

2.4 Click [Save].

3. The Enter Password screen will display.

<table>
<thead>
<tr>
<th>Enter Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirm your Personal Image is correct. If you recognize your Personal Image, you'll know for sure that you are at the correct site. Confirming your Personal Image is also how you'll know that it's safe to enter your Password.</td>
</tr>
<tr>
<td><img src="personal_image.png" alt="Image" /></td>
</tr>
<tr>
<td>If you don't recognize your Personal Image, do not enter your password. Password:</td>
</tr>
<tr>
<td><img src="log_in.png" alt="Log In" /></td>
</tr>
</tbody>
</table>

4. Verify your personal image and enter your password.

5. Click [Log In].
   5.1 If your password has expired, the Password Expiration screen will display.

<table>
<thead>
<tr>
<th>Change Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Password has expired. Please change it now.</td>
</tr>
</tbody>
</table>

5.2 Click [OK] and the Change Password is displayed.
5.3 Enter your Old Password.
5.4 Enter your New Password.
5.5 Re-enter your New password.
5.6 Click [Save].

6. The Choose an Application page displays and you are successfully logged in.

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

1.4.2 Change Password

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

From the Choose an Application page, follow these steps:
1. Click [Change Password] and the Change Password screen is displayed.
2. Enter your Old Password.

3. Enter your New Password.

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

4. Re-enter your New Password.

5. Click [Save].

6. The next time you log in, you will be required to use your new password.

### 1.4.3 Edit User Information

Users can maintain some of their own user information.

From the Choose an Application page, follow these steps:

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

2. You may edit the following fields (required fields are in **bold**):
   
   2.1 Middle Initial
   
   2.2 Last Name
   
   2.3 Email Address
   
   2.4 SMS Address/Number
3. To change your personal image, select the ‘Change personal image’ link and the Personal Image Selection screen is displayed.

<table>
<thead>
<tr>
<th>Personal Image Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Personal Image helps you know for sure that you are at the valid site. Every time you sign in, you will see your Personal Image after you enter your User Name.</td>
</tr>
<tr>
<td>Please select a Personal Image:</td>
</tr>
</tbody>
</table>

3.1 Click on a radio button below an image; this is the image that will display on the Enter Password screen each time you login to ensure you are at the correct website.

3.2 Click [Save].

3.3 The User Information screen is displayed with your updated personal image.

4. Click [Save].

1.5 Navigation

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

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

1.5.1 Standard Menu

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

- Reports
- Search
- School Profile
- Payment History
- Award Rules
- Information Roster
- Certification
- Request Reinstatement
- Reconcile Payments
- File Requests
- Owe Refund Students
- Send Email
- Help

Note: Certification, Request Reinstatement, Reconcile Payments, File Requests and Owe Refund Students only display for school users with at minimum “Update” security level for an aid program.

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

- Existing MASSGrant Records (listed by academic year)
- Transaction History
- Payment History

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

1.6 Help
MASSAid provides a comprehensive help system. To access the Help system, follow this step:

1. Click the [Help] option on the standard menu.
2. The User Guide will be displayed.
2 Reports

2.1 Navigation

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

- Activity Reports
- Rosters

To access any report:

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

2.2 Activity Reports

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

![MASSAid Report Options]

2.2.1 Decline Award Report

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

1. Academic Year
   1.1 Current – Default
   1.2 Future (if applicable)
2. Aid Program
3. Display: (determines how the data sorts)
   3.1 Alphabetical by Last Name - Default
   3.2 Numerical by SSN

**Output on Report**

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

### 2.2.2 Eligible Students Report

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

**Input Criteria**

1. Academic Year
   1.1 Current – Default
   1.2 Future (if applicable)
2. Aid Program
3. Display: (determines how the data sorts)
   3.1 Alphabetical by Last Name - Default
   3.2 Numerical by SSN

**Output on Report**

1. Student Name
2. SSN
3. Total Award
4. Fall Amount
5. Spring Amount

### 2.2.3 Ineligible Students Report

This report displays all ineligible students for the selected academic year and aid program sorted by the selected display option.
**Input Criteria**

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

2. Aid Program

3. Display: (determines how the data sorts)
   3.1 Alphabetical by Last Name - Default
   3.2 Numerical by SSN
   3.3 Chronological by Number of Days Remaining to Clear Ineligible Reasons

**Output on Report**

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

### 2.2.4 NIL Default Students Report

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

**Input Criteria**

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

**Output on Report**

1. Student Name
2. SSN

### 2.2.5 Payment Summary Report

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

**Input Criteria**

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

2. Aid Program
Output on Report

1. Payment Batches
   1.1 Batch Date
   1.2 Batch Number
   1.3 Number of Students
   1.4 Payment Batch Amount
   1.5 Actual Amount Paid

2. Process Pre-Payment/Returned Funds
   2.1 Date
   2.2 Type
   2.3 Amount

3. Refunds
   3.1 Date
   3.2 SSN
   3.3 Student Name
   3.4 Term
   3.5 Amount

4. Balance Due OSFA

5. Balance Due School

2.2.6 Returned Mail Report

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

Input Criteria

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

Output on Report

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

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

Input Criteria

1. Criteria
   1.1 Awarded – Default
   1.2 Paid

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

2. Academic Year
   2.1 Current – Default
   2.2 Future (if applicable)

3. Aid Program

4. Display: (determines how the data sorts if “All Schools” is selected)
   4.1 Alphabetical by School - Default
   4.2 Grouped by School Type

Output on Report

1. School
2. Student Name
3. SSN
4. Fall Amount
5. Spring Amount
6. Total Amount

2.3 Rosters

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

Please be aware! The information you are accessing may display the student's Social Security Number (SSN) and should be considered confidential.
2.3.1 Certification Roster

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

Input Criteria
1. Academic Year
   1.1 Current – Default
   1.2 Future (if applicable)
2. Program
3. Term
   3.1 Fall
   3.2 Spring
4. Display (determines how the data sorts)
   4.1 Alphabetical by Last Name – Default
   4.2 Numerical by SSN

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

2.3.2 Information Roster

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

Input Criteria
1. Academic Year
   1.1 Current – Default
   1.2 Future (if applicable)
2. Term
   2.1 Fall
   2.2 Spring
3. Display (determines how the data sorts)
   3.1 Alphabetical by Last Name – Default
   3.2 Numerical by SSN
Output on Report
1. Student Name
2. SSN
3. Address
4. City
5. State
6. Zip
7. EFC
8. Student AGI
9. Student Taxes Paid
10. Student Worksheet A
11. Student Worksheet B
12. Student Worksheet C
13. Student Number in Family
14. Student Number in College
15. Parent AGI
16. Parent Taxes Paid
17. Parent Worksheet A
18. Parent Worksheet B
19. Parent Worksheet C
20. Parent Number in Family
21. Parent Number in College
22. Dependency Status
23. Terms Paid
24. Grade Level
25. Term Amount (if applicable)
26. Ineligible Reason(s) (if applicable)

2.3.3 Payment Roster
This report displays all students with a payment record or refund in ‘Paid’ status for the selected academic year, aid program, and term.

Input Criteria
1. Academic Year
   1.1 Current – Default
   1.2 Future (if applicable)
2. Program
3. Term
   3.1 Fall
   3.2 Spring
4. Display (determines how the data sorts)
   4.1 Alphabetical by Last Name – Default
   4.2 Numerical by SSN
   4.3 Chronological by Paid Date

**Output on Report**
1. Student Name
2. SSN
3. Paid Date
4. Term
5. Amount
3 Search

3.1 Enter Search Criteria

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

To perform a search, follow these steps:

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

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

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

3. Enter additional search criteria:
   3.1 Academic Year
   3.2 Aid Program
4. If an Aid Program is selected, additional aid program search criteria is displayed:
   4.1 Search Type
       4.1.1 Payment Status
       4.1.2 Eligible Status
       4.1.3 Ineligible Status
   4.2 If Payment Status is selected, additional search criteria is displayed:
       4.2.1 Status – a list of valid payment statuses for the selected aid program
           4.2.1.1 If 'Not Paid' is selected, additional search criteria is displayed:
                4.2.1.1.1 No Award Reason
       4.2.2 Term
   4.3 If Eligible Status is selected, additional search criteria is displayed:
       4.3.1 Status – a list of valid eligible statuses for the selected aid program
   4.4 If Ineligible Status is selected, additional search criteria is displayed:
       4.4.1 Status – a list of valid ineligible statuses for the selected aid program
5. Click [Submit Criteria] and the search results meeting your criteria will display
6. To clear any criteria you have entered, click [Reset Criteria]

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

3.2 Understanding Your Search Results

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

3.2.1 Populate Quick View Menu from Search Results

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

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

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

4.1 View School Profile

To view a school profile, follow these steps:

1. Select School Profile from the menu. The Select Program screen is displayed.

2. Select an aid program. The School Profile is displayed for the selected aid program.

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

To update a school profile for an aid program, you must have security level of “Update” or “Administrator” for the aid program.

To update a school profile, follow these steps:

Note: This is a sample School Profile for the MASSGrant program; fields in the “Program” section may differ per aid program.
1. From the School Profile screen, click [Update].

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

2. The Update School Profile screen is displayed.
Note: This is a sample Update School Profile for the MASSGrant program; fields in the ‘Program’ section may differ per aid program.

3. Edit one or more of the following fields in the Program section:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Name</td>
<td>John Smith</td>
</tr>
<tr>
<td>Contact Title</td>
<td>Director</td>
</tr>
<tr>
<td>Contact Email Address</td>
<td><a href="mailto:jsmith@contact.email">jsmith@contact.email</a></td>
</tr>
<tr>
<td>Phone Number</td>
<td>222-222-2222</td>
</tr>
<tr>
<td>Fax Number</td>
<td>333-333-3333</td>
</tr>
<tr>
<td>Secondary Contact Name</td>
<td></td>
</tr>
<tr>
<td>Secondary Contact Title</td>
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<td></td>
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<td>Secondary Fax Number</td>
<td></td>
</tr>
<tr>
<td>School Type</td>
<td>Massachusetts Community College</td>
</tr>
<tr>
<td>Summer Payment Indicator</td>
<td>No</td>
</tr>
<tr>
<td>Active School Indicator</td>
<td>Yes</td>
</tr>
<tr>
<td>Fall Certification Duration</td>
<td>90</td>
</tr>
<tr>
<td>Fall Reinstated Certification Duration</td>
<td></td>
</tr>
<tr>
<td>Spring Certification Duration</td>
<td>90</td>
</tr>
<tr>
<td>Spring Reinstated Certification Duration</td>
<td></td>
</tr>
<tr>
<td>Reconciliation Duration</td>
<td>30</td>
</tr>
<tr>
<td>Hold Payments</td>
<td>No</td>
</tr>
</tbody>
</table>
3.1 Contact Name
3.2 Contact Title
3.3 Contact Email Address
3.4 Phone Number
3.5 Fax Number
3.6 Secondary Contact Name
3.7 Secondary Contact Title
3.8 Secondary Contact Email Address
3.9 Secondary Phone Number
3.10 Secondary Fax Number

Note: Only school contact information is updateable by school users.

4. Click [Save].

4.3 View School Transaction History

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

To view a school’s Transaction History, follow these steps:
1. From the School Profile screen click [Transaction History]
2. The School Transaction History screen is displayed.

Updates to school demographics are not associated to an academic year; these updates display at the top of the transaction history.
4.4 Add Comment on School Profile

Agency and School users can enter comments for display on the school’s Transaction History. Comments entered by Agency users are not viewable by School users.

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

1. From the School Profile screen click [Comments].
2. The Add Comments screen is displayed.
3. Enter comment text.
4. Click [Save].
5 Payment History

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

5.1 View Payment History

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

1. Select Payment History from the menu. The Select Program screen is displayed.

2. Select an aid program.

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

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

### 5.2 View Payment Batch Details

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

1. From the Payment History screen, select a Batch Number.
2. The Payment Batch Details screen is displayed.
**Note:** If there is a Current Balance for your school when the payment batch is created, the amount is netted with the payment amount. If this occurs, the ‘Total Sent to School’ will differ from the ‘Total’ of the payment batch.
6 Award Rules

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

6.1 View Award Rules

To view the award rules for an aid program, follow these steps:

1. Select Award Rules from the menu. The Select Program screen is displayed.

2. Select an aid program.

3. The Award Rules screen is displayed for the selected aid program.

Note: This is a sample Award Rules for the MASSGrant program.

Note: The cutoff values, cutoff dates, and amounts are defined annually by the agency.

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

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

To view the MASSGrant payment table, follow these steps:

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

![MASSGrant Payment Table](image)

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

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

7.1 View MASSGrant Record

For each FAFSA processed by MASSAid, MASSGrant record is created. By entering a student SSN in the SSN Quick View on the main menu, a list of existing MASSGrant records are displayed by academic year.

To view a student’s MASSGrant record, follow these steps:

1. From the Quick View menu, select the academic year link for the MASSGrant record you wish to view.

2. The MASSGrant record displays (shown in 3 pieces)
# Application Information

<table>
<thead>
<tr>
<th>Institution</th>
<th>ISIR Date Override</th>
</tr>
</thead>
<tbody>
<tr>
<td>002128-00, BOSTON COLLEGE</td>
<td>FAFSA Original Application Date 02/01/2011</td>
</tr>
<tr>
<td>State of Legal Residence</td>
<td>FAFSA Current Application Date 06/23/2011</td>
</tr>
<tr>
<td>Residence Date</td>
<td>Clear All Problems Override</td>
</tr>
<tr>
<td>Parent State of Legal Residence</td>
<td>Clear All Problems Expiration Date</td>
</tr>
<tr>
<td>Parent Residence Date</td>
<td>Cleaned All Problems Date</td>
</tr>
<tr>
<td>SSN Match</td>
<td>1st BA Override</td>
</tr>
<tr>
<td>SAR C Flag</td>
<td>Grade Level</td>
</tr>
<tr>
<td>NSLDS Override</td>
<td>Bachelors Degree</td>
</tr>
<tr>
<td>NSLDS Match</td>
<td>Degree/Certificate</td>
</tr>
<tr>
<td>Drug Overdue</td>
<td>Associates Degree - General</td>
</tr>
<tr>
<td>Drug Conviction</td>
<td>EdTransfer</td>
</tr>
<tr>
<td>Anticipated Fall Enrollment</td>
<td>1st Year, Attended Before</td>
</tr>
<tr>
<td>Anticipated Spring Enrollment</td>
<td>US Citizen</td>
</tr>
<tr>
<td>Eligibility Override</td>
<td>Award Letter Date</td>
</tr>
<tr>
<td>Return Mail Indicator</td>
<td>Original Ineligible Letter Date</td>
</tr>
<tr>
<td>Decline Fall Award</td>
<td>Current Ineligible Letter Date</td>
</tr>
<tr>
<td>Decline Spring Award</td>
<td>Insufficient Res Letter Date</td>
</tr>
</tbody>
</table>

- **Update Application Information**

---

# Financial Information

<table>
<thead>
<tr>
<th>EFC</th>
<th>Dependency Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Independent</td>
</tr>
<tr>
<td>Student Number in Household</td>
<td>Parent Number in Household</td>
</tr>
<tr>
<td>1</td>
<td>Parent Number in College</td>
</tr>
<tr>
<td>1</td>
<td>Parent Number of Exemptions</td>
</tr>
<tr>
<td>Student AGI</td>
<td>Parent AGI</td>
</tr>
<tr>
<td>Student Taxes Paid</td>
<td>Parent Taxes Paid</td>
</tr>
<tr>
<td>Student Tax Form</td>
<td>Parent Tax Form</td>
</tr>
<tr>
<td>Student Untaxed Total</td>
<td>Parent Untaxed Total</td>
</tr>
<tr>
<td>00000</td>
<td>Parent Additional Total</td>
</tr>
<tr>
<td>Student Additional Total</td>
<td>Parent Additional Total</td>
</tr>
<tr>
<td>00000</td>
<td>Parent Net Worth of Investments</td>
</tr>
<tr>
<td>Student Net Worth of Investments</td>
<td>Parent Net Worth of Investments</td>
</tr>
<tr>
<td>0</td>
<td>Parent Net Worth of Business/Savings</td>
</tr>
<tr>
<td>0</td>
<td>Parent Net Worth of Business/Savings</td>
</tr>
<tr>
<td>0</td>
<td>Farm</td>
</tr>
<tr>
<td>0</td>
<td>Farm</td>
</tr>
<tr>
<td>Student Income Work</td>
<td>Mother Income Work</td>
</tr>
<tr>
<td>0</td>
<td>Father Income Work</td>
</tr>
</tbody>
</table>

- **Update Financial Information**

---

# ISIR Comments

- **Comment Code:** 001
- **Comment:** WHAT YOU MUST DO NOW (Use the checklist below to make sure that all of your issues are resolved)

- **Comment Code:** 006
- **Comment:** If you need to make corrections to your information, you may either make them online at www.fafsa.gov, or by using this SAR. You must use your Federal Student Aid PIN to access your record online. If you need additional help with your SAR, contact your school’s financial aid office or the Federal Student Aid Information Center at 1-800-4-FED-AID (1-800-433-3243). If your mailing address or e-mail address changes, you can make the correction online, send in the correction on your SAR, or call 1-800-4-FED-AID and ask a customer service representative to make the change for you.

- **Comment Code:** 148
- **Comment:** Based on the information we have on record for you, your EFC is 0. You may be eligible to receive a Federal Pell Grant and other federal student aid. Your school will use your EFC to determine your financial aid eligibility for federal grants, loans, and work study, and possible funding from your state and school.

---

# Reject Reason Codes

- **No Reject Reasons to Display**
The MASSGrant record contains student, application, certification, and payment information relative to the academic year selected.

If a student is eligible for the MASSGrant program, “Eligible” status is displayed. If a student is not eligible for the MASSGrant program, “Ineligible” status is displayed along with one or more ineligible reasons.

7.1.1 Add MASSGrant Comment on Student

Users with, at minimum, “Update” security level for MASSGrant can enter comments for display in the student transaction history.

To enter a comment on a student, follow these steps:

1. From the MASSGrant Record screen, click [Add Comment]. The Add Comments screen displays.

![Add Comments Screen]

2. Enter your comment text.

3. Click [Save].

The comment will display on the student’s transaction history screen.

7.2 Update MASSGrant Record

Users with, at minimum, “Update” security level for MASSGrant can update MASSGrant records for the current or a future academic year. Records from previous academic years are not updateable.

When a MASSGrant record is updated, the MASSAid system re-determines eligibility for that student. This may affect the status of the student, including the award amounts for any unpaid terms.
7.2.1 Update Student Information

To update the Student Information on a MASSGrant record, follow these steps:

1. From the MASSGrant Record screen, click [Update Student Information].
2. The Update Student Information screen displays pre-filled with existing information.

3. Edit one or more of the following fields (fields in bold are required):
   
   3.1 Last Name
   3.2 First Name
   3.3 Middle Initial
   3.4 Address
   3.5 City
   3.6 State
   3.7 Zip 5
   3.8 Zip 4
   
   *Note: The address cannot be updated if the state is not ‘MA.’*
   
   3.9 Home Phone Number
   3.10 Email Address
   3.11 Undeliverable Email Address (checkbox)
3.12 Date of Birth
3.13 Gender
3.14 Drivers License State
3.15 Drivers License Number

4. Click [Save].
The updated MASSGrant record displays, and student eligibility is re-determined.

7.2.2 Update Application Information
To update the Application Information on a MASSGrant record, follow these steps:
1. From the MASSGrant Record screen, click [Update Application Information].
2. The Update Application Information screen displays pre-filled with existing information.

3. Edit one or more of the following fields (fields in **bold** are required):
   3.1 Citizenship Override (checkbox)
   3.2 NSLDS Override (checkbox)
   3.3 Drug Override (checkbox)
   3.4 **Anticipated Fall Enrollment**
   3.5 **Anticipated Spring Enrollment**
   3.6 1* BA Override (checkbox)
3.7 Grade Level
3.8 Bachelors Degree
3.9 Degree/Certificate
3.10 Masters/Doctorate
3.11 Decline Fall Award (checkbox)
3.12 Decline Spring Award (checkbox)

4. Click [Save].
The updated MASSGrant record displays, and student eligibility is re-determined.

Note: Selecting any “override” checkbox will ignore the associated ineligible reason for the student for the academic year.

7.2.3 Update Financial Information

To update the Financial Information on a MASSGrant record, follow these steps:
1. From the MASSGrant Record screen, click [Update Financial Information].
2. The Update Financial Information screen displays pre-filled with existing information.

3. Edit one or more of the following fields (fields in bold are required):
   3.1 Reason
   3.2 EFC
Note: If the EFC is updated, at least one additional field (other than Reason) must be updated.

3.3 **Dependency Status**

3.4 Student Number in Household
3.5 Parent Number in Household
3.6 Student Number in College
3.7 Parent Number in College
3.8 Student Number of Exemptions
3.9 Parent Number of Exemptions
3.10 Student AGI
3.11 Parent AGI
3.12 Student Taxes Paid
3.13 Parent Taxes Paid
3.14 Student Tax Form
3.15 Parent Tax Form
3.16 Student Untaxed Total
3.17 Parent Untaxed Total
3.18 Student Additional Total
3.19 Parent Additional Total
3.20 Student Net Worth of Investments
3.21 Parent Net Worth of Investments
3.22 Student Cash, Savings and Checking
3.23 Parent Cash, Savings and Checking
3.24 Student Net Worth Business/Inv Farm
3.25 Parent Net Worth Business/Inv Farm
3.26 Student Income Work
3.27 Mother Income Work
3.28 Father Income Work

Note: All 'Parent' fields are disabled if the student’s Dependency Status is “Independent.”

4. Click [Save].

The updated MASSGrant record displays, and student eligibility is re-determined.
8 Transfer Student to User’s School

8.1 Transfer Student

When a student SSN is entered in the Quick View menu and the student has not attended the user’s school, the school user has the opportunity to transfer the student to their school.

To transfer a student to your school, follow these steps:

1. Enter the SSN of the student who is not attending your school in the Quick View menu.
2. The ‘transfer student’ message will display.
3. Select ‘click here.’ The Choose an Academic Year screen is displayed.

![SSN Quick View screenshot]

![Process Transfer to TEST INSTITUTION screenshot]
4. Select an academic year. The Select Transfer Term screen is displayed.

![Process Transfer to TEST INSTITUTION](image)

Please verify you wish to transfer the following student to your institution:

JOHN L SMITH, 666-66-6666
DOB: 07/13/1990
Currently at: BERKLEE COLLEGE OF MUSIC

Transfer Term: [drop-down menu]

Only non-Paid terms are available for transfer.

The transfer will be initiated from the Transfer Term selected and forward. If Transfer Term 'Fall' is selected, the transfer will be processed for the Fall and Spring terms (provided neither term has already been paid by another institution). If Transfer Term 'Spring' is selected, the transfer will be processed for the Spring term (provided the Spring term has not been paid by another institution).

[Process Transfer] [Cancel]

5. Select a transfer term.

Note: The transfer will be initiated from the Transfer Term selected and forward. If transfer term 'Fall' is selected, the transfer will be processed for the Fall and Spring terms (provided neither term has already been paid by another institution). If transfer term 'Spring' is selected, the transfer will be processed for the Spring term (provided the Spring term has not been paid by another institution).

6. Click [Process Transfer].

The student will be transferred and the Quick View menu will be populated for the student.
9 Student Transaction History

9.1 View Student Transaction History

The student transaction history displays updates made to student grant and scholarship records chronologically by academic year. In addition, comments are displayed in chronological order among the transactions.

To view a student transaction history, follow these steps:

1. From the SSN Quick View menu for a student, select Transaction History.
2. The Student Transaction History screen is displayed.

Users can filter by comments only or by field by selecting a filter option.

![Student Transaction History Screen](image)
10  Student Payment History

10.1  View Student Payment History

The student payment history displays paid payments the agency has disbursed to the student for all aid programs, chronologically by academic year. In addition, any paid adjustments to payment records display chronologically.

To view a student’s payment history, follow these steps:

1. From the SSN Quick View menu for a student, select Payment History.
2. The Student Payment History screen is displayed.

![Student Payment History Table]

<table>
<thead>
<tr>
<th>Date</th>
<th>Batch Number</th>
<th>Program</th>
<th>Institution</th>
<th>Term</th>
<th>Reconciled</th>
<th>Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012/01/23</td>
<td>B0073642-</td>
<td>MASSGrant</td>
<td>BOSTON</td>
<td>Spring</td>
<td></td>
<td>Adjustment</td>
<td>$400.00</td>
</tr>
<tr>
<td></td>
<td>B0073666</td>
<td></td>
<td>COLLEGE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011/12/02</td>
<td>B0073642</td>
<td>MASSGrant</td>
<td>BOSTON</td>
<td>Spring</td>
<td>Y</td>
<td>Payment</td>
<td>$800.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>COLLEGE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011/12/02</td>
<td>B0073641</td>
<td>MASSGrant</td>
<td>BOSTON</td>
<td>Fall</td>
<td>Y</td>
<td>Payment</td>
<td>$800.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>COLLEGE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
11 Cumulative Information Roster

School users must access all MASSGrant students prior to the certification process to verify data and, if applicable, package awards. Through the online Cumulative Information Roster, school users can access an electronic file. Agency users can access this file on a school's behalf.

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

11.1 Download Information Roster

Users can download an Information Roster and save it.

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

To download the information roster, follow these steps:

1. Select Information Roster from the menu. The Select Program screen is displayed.

   ![Select Program Screen]

2. Select a program. The Select Academic Year and Term screen is displayed.
3. Select an academic year and term and click [Download Information Roster].

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

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

5. The File Request screen is displayed. Refresh the screen until the file has completed processing; indicated by a Down Arrow icon in the Download column.
Note: Users may navigate away while waiting for the file to process. Simply select File Requests from the main menu to return to this screen and view the file status.

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

6. Select the Down Arrow icon.
7. A File Download message and the File Download dialog box displays.

8. Select [Save] from the File Download dialog box. The Save As dialog box displays.
9. A default directory and file name display. Select where the downloaded file will be saved on your PC.
10. Click [Save].
11. When the download is complete, the Download Complete dialog box displays.
12. Click [Open] if you wish to view the file, or click [Close] to return to the File Requests screen.

The description and layout of the information roster download file is:

1. The format is “Comma Separated Values” (CSV)
2. All alphanumeric data types are enclosed in double quotes
3. All fields are delimited by a comma
4. Carriage Return Line Feed (CRLF) at the end of each row

<table>
<thead>
<tr>
<th>MAX Len</th>
<th>Field Name</th>
<th>Type</th>
<th>Field Description/Valid Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>SSN</td>
<td>Alphanumeric</td>
<td>Social Security Number</td>
</tr>
<tr>
<td>16</td>
<td>Last Name</td>
<td>Alphanumeric</td>
<td>Last Name</td>
</tr>
<tr>
<td>15</td>
<td>First Name</td>
<td>Alphanumeric</td>
<td>First Name</td>
</tr>
<tr>
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<td>Middle Initial</td>
<td>Alphanumeric</td>
<td>Middle Initial</td>
</tr>
<tr>
<td>40</td>
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<td>Alphanumeric</td>
<td>Street Address</td>
</tr>
<tr>
<td>20</td>
<td>City</td>
<td>Alphanumeric</td>
<td>City</td>
</tr>
<tr>
<td>20</td>
<td>State</td>
<td>Alphanumeric</td>
<td>State</td>
</tr>
<tr>
<td>9</td>
<td>Zip</td>
<td>Alphanumeric</td>
<td>Zip Code (Zip5 + Zip4)</td>
</tr>
<tr>
<td>4</td>
<td>Tracking Status</td>
<td>Alphanumeric</td>
<td>Always send “ZZ”</td>
</tr>
<tr>
<td>MAX Len</td>
<td>Field Name</td>
<td>Type</td>
<td>Field Description/Valid Values</td>
</tr>
<tr>
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<td>-------------------------</td>
<td>------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
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<tr>
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<td>EFC</td>
<td>Numeric</td>
<td>Student's EFC</td>
</tr>
<tr>
<td>7</td>
<td>Student AGI</td>
<td>Numeric</td>
<td>Student's AGI</td>
</tr>
<tr>
<td>7</td>
<td>Student Taxes Paid</td>
<td>Numeric</td>
<td>Student's Taxes Paid</td>
</tr>
<tr>
<td>7</td>
<td>Student Worksheet A</td>
<td>Numeric</td>
<td>Student's Worksheet A</td>
</tr>
<tr>
<td>7</td>
<td>Student Worksheet B</td>
<td>Numeric</td>
<td>Student's Worksheet B</td>
</tr>
<tr>
<td>7</td>
<td>Student Worksheet C</td>
<td>Numeric</td>
<td>Student's Worksheet C</td>
</tr>
<tr>
<td>2</td>
<td>Student Number in Family</td>
<td>Numeric</td>
<td>Student's Number in Family</td>
</tr>
<tr>
<td>2</td>
<td>Student Number in College</td>
<td>Numeric</td>
<td>Student's Number in College</td>
</tr>
<tr>
<td>7</td>
<td>Parent AGI</td>
<td>Numeric</td>
<td>Parent's AGI</td>
</tr>
<tr>
<td>7</td>
<td>Parent Taxes Paid</td>
<td>Numeric</td>
<td>Parent's Taxes Paid</td>
</tr>
<tr>
<td>7</td>
<td>Parent Worksheet A</td>
<td>Numeric</td>
<td>Parent's Worksheet A</td>
</tr>
<tr>
<td>7</td>
<td>Parent Worksheet B</td>
<td>Numeric</td>
<td>Parent's Worksheet B</td>
</tr>
<tr>
<td>7</td>
<td>Parent Worksheet C</td>
<td>Numeric</td>
<td>Parent's Worksheet C</td>
</tr>
<tr>
<td>2</td>
<td>Parent Number in Family</td>
<td>Numeric</td>
<td>Parent's Number in Family</td>
</tr>
<tr>
<td>2</td>
<td>Parent Number in College</td>
<td>Numeric</td>
<td>Parent's Number in College</td>
</tr>
<tr>
<td>4</td>
<td>Academic Year</td>
<td>Numeric</td>
<td>Academic Year Selected Leading year of academic year (ie. ‘2010’ for academic year ‘2010-2011’)</td>
</tr>
</tbody>
</table>
| 6       | Term                    | Alphanumeric | Term Selected  
|          |                         |            | Valid Values:  
|          |                         |            | Fall  
|          |                         |            | Spring |
| 1       | Dependency Status       | Alphanumeric | Dependency Status  
|          |                         |            | Valid Values:  
|          |                         |            | If “D” send “D”  
|          |                         |            | If “I” send “I”  
|          |                         |            | If “X” or “Y” send “U” |
| 6       | School OE Code          | Alphanumeric | OE Code of School  |
| 2       | Terms Paid              | Numeric    | Number of paid terms student has received (count of paid payments greater than zero (including adjustments)) |
| 1       | Year in School          | Numeric    | Grade Level  
|          |                         |            | Valid Values:  
|          |                         |            | 0 = 1st year, never attended college  
|          |                         |            | 1 = 1st year, attended college before  
|          |                         |            | 2 = 2nd year/sophomore  
|          |                         |            | 3 = 3rd year/junior  
|          |                         |            | 4 = 4th year/senior  
|          |                         |            | 5 = 5th year/other undergraduate  
|          |                         |            | 6 = 1st year graduate/professional  
|          |                         |            | 7 = Continuing graduate/professional  
|          |                         |            | Blank |
| 5       | Award Amount            | Numeric    | Payment amount for the term selected  
<p>|          |                         |            | If no payment record exists because student is “Ineligible,” send 0  |
| 20      | Award Name              | Alphanumeric | Always send ‘MASSGrant’  |
| 1       | Residency OK            | Alphanumeric | If student ineligible for “Student Not MA Resident” send “N”, else send “Y”  |
| 1       | Parent Residency OK     | Alphanumeric | If student ineligible for “Parent Not MA Resident” send “N”, else send “Y”  |</p>
<table>
<thead>
<tr>
<th>MAX Len</th>
<th>Field Name</th>
<th>Type</th>
<th>Field Description/Valid Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1st BA OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Prior Bachelors Degree Received” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>ISIR OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “FAFSA Received Past Deadline” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>EFC OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “EFC Too High” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>MASSGrant School OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Ineligible Institution” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>Terms Paid OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Maximum Semesters of Eligibility Received” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>SSN OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Name/SSN Mismatch” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>Missing Information OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Missing Information” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>NIL Default OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Default on State Loan” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>Herter OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Herter Scholarship Recipient” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>Drug OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Answered Yes to Drug Question” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>NSLDS OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Loan Default and/or Refund Owed on Federal Financial Aid” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>Refund OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Refund Owed on State Financial Aid” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>Enrollment OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Enrolled Less Than Full-time” send “N”, else send “Y”</td>
</tr>
<tr>
<td>1</td>
<td>Citizenship OK</td>
<td>Alphanumeric</td>
<td>If student ineligible for “Citizenship Status” send “N”, else send “Y”</td>
</tr>
</tbody>
</table>
12 Certification

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

12.1 Online Certification

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

To begin the certification process, follow these steps:

1. Select Certification from the menu. The Select Program screen is displayed.

2. Select an aid program. The Select Academic Term screen is displayed.

3. Select a term.

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

4. Click [Certification Roster] and the Data Element Changes screen is displayed.
Note: Students can be filtered by last name by entering a full or partial last name and selecting [Apply Filter]. Students can be sorted by Name or SSN by selecting the column header.

12.1.1 Data Element Changes Prior to Certification

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

1. From the Data Element Changes screen, select a student.
2. The Update Financial Information screen is displayed for the selected student.
3. Edit one or more of the following fields (fields in **bold** are required):

3.1 **Reason**

3.2 **EFC**

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

3.3 **Dependency Status**

3.4 Student Number in Household

3.5 Parent Number in Household

3.6 Student Number in College

3.7 Parent Number in College

3.8 Student Number of Exemptions

3.9 Parent Number of Exemptions

3.10 Student AGI

3.11 Parent AGI

3.12 Student Taxes Paid

3.13 Parent Taxes Paid

3.14 Student Tax Form

3.15 Parent Tax Form
3.16 Student Untaxed Total
3.17 Parent Untaxed Total
3.18 Student Additional Total
3.19 Parent Additional Total
3.20 Student Net Worth of Investments
3.21 Parent Net Worth of Investments
3.22 Student Cash, Savings and Checking
3.23 Parent Cash, Savings and Checking
3.24 Student Net Worth Business/Inv Farm
3.25 Parent Net Worth Business/Inv Farm
3.26 Student Income Work
3.27 Mother Income Work
3.28 Father Income Work

Note: All ‘Parent’ fields are disabled if the student’s Dependency Status is “Independent.”

4. Click [Save].
The updated Data Element Changes screen displays, and student eligibility is re-determined.

12.1.2 Online Certification Roster
To certify students online, follow these steps:
1. From the Data Element Changes screen, click [Go To Certification].
2. The Online Certification Roster screen is displayed.
3. Enter/select the following:

3.1 Award Amount

3.2 Certification indicator

3.2.1 Yes

3.2.2 No

3.2.3 No, Keep Spring (Fall certification roster only)

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

3.3 No Award Reason (required if ‘No’ or ‘No, Keep Spring’ selected)

3.3.1 Not Enrolled

3.3.2 Less Than Full-time

3.3.3 Unsatisfactory Progress

3.3.4 Overaward

3.3.5 Leave of Absence

3.3.6 Verification Incomplete
3.3.7 Other

3.4 Award Reduced Reason (required if the Award Amount is lowered)
3.4.1 EFC Change
3.4.2 Overaward

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

4. Click [Save].

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

### 12.2 Download Certification Roster

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

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

To download the certification roster, follow these steps:

1. Select Certification from the menu. The Select Program screen is displayed.

2. Select an aid program. The Select Academic Term screen is displayed.

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

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

4. The Verity Criteria screen displays. Verify the program and term selected, click [Download File].
5. The File Request screen is displayed. Refresh the screen until the file has completed processing; indicated by a Down Arrow icon in the Download column.

6. Select the Down Arrow icon.

7. A File Download message and the File Download dialog box displays.

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

Once the file has completed, the status column will indicate the file has completed successfully or indicate there were errors. You may select the status column for additional details.
8. Select [Save] from the File Download dialog box. The Save As dialog box displays.

9. A default directory and file name display. Select where the downloaded file will be saved on your PC.

10. Click [Save].

11. When the download is complete, the Download Complete dialog box displays.

12. Click [Open] if you wish to view the file, or click [Close] to return to the File Requests screen.

The description and layout of the certification roster download file is:

1. The format is “Comma Separated Values” (CSV)
2. All alphanumeric data types are enclosed in double quotes ("")
3. Numeric fields cannot contain decimals
4. All fields are delimited by a comma (,)
5. Carriage Return Line Feed (CRLF) at the end of each row

<table>
<thead>
<tr>
<th>MAX Len</th>
<th>Field Name</th>
<th>Type</th>
<th>Field Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>SSN</td>
<td>Alphanumeric</td>
<td>Student’s Social Security Number</td>
</tr>
<tr>
<td>16</td>
<td>Last Name</td>
<td>Alphanumeric</td>
<td>Student’s Last Name</td>
</tr>
<tr>
<td>20</td>
<td>First Name</td>
<td>Alphanumeric</td>
<td>Student’s First Name</td>
</tr>
<tr>
<td>20</td>
<td>Middle Initial</td>
<td>Alphanumeric</td>
<td>Student’s Middle Initial</td>
</tr>
<tr>
<td>50</td>
<td>Address</td>
<td>Alphanumeric</td>
<td>Student’s Street Address</td>
</tr>
<tr>
<td>50</td>
<td>City</td>
<td>Alphanumeric</td>
<td>Student’s City</td>
</tr>
<tr>
<td>2</td>
<td>State</td>
<td>Alphanumeric</td>
<td>Student’s State</td>
</tr>
<tr>
<td>9</td>
<td>Zip Code</td>
<td>Alphanumeric</td>
<td>Student’s Zip Code (Zip5 + Zip4)</td>
</tr>
<tr>
<td>7</td>
<td>EFC</td>
<td>Numeric</td>
<td>Expected Family Contribution</td>
</tr>
<tr>
<td>7</td>
<td>Student AGI</td>
<td>Numeric</td>
<td>Student’s AGI</td>
</tr>
<tr>
<td>7</td>
<td>Student Taxes Paid</td>
<td>Numeric</td>
<td>Student’s Taxes Paid</td>
</tr>
</tbody>
</table>
| 1       | Student Tax Form Used | Alphanumeric | Student’s Tax Form Used  
Valid values include:
“1” – IRS 1040  
“2” – IRS 1040A or 1040EZ  
“3” – Foreign tax return  
“4” – Puerto Rico, US territory, freely associated state |
<p>| 5       | Student Untaxed Income Total  | Numeric     | Student’s Untaxed Income Total                                                   |</p>
<table>
<thead>
<tr>
<th>MAX Len</th>
<th>Field Name</th>
<th>Type</th>
<th>Field Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Student Additional Financial Information Total</td>
<td>Numeric</td>
<td>Student’s Additional Financial Information Total</td>
</tr>
<tr>
<td>2</td>
<td>Student Number in Family</td>
<td>Numeric</td>
<td>Student’s Number in Family</td>
</tr>
<tr>
<td>2</td>
<td>Student Number in College</td>
<td>Numeric</td>
<td>Student’s Number in College</td>
</tr>
<tr>
<td>7</td>
<td>Parent AGI</td>
<td>Numeric</td>
<td>Parent’s AGI</td>
</tr>
<tr>
<td>7</td>
<td>Parent Taxes Paid</td>
<td>Numeric</td>
<td>Parent’s Taxes Paid</td>
</tr>
<tr>
<td>1</td>
<td>Parent Tax Form Used</td>
<td>Numeric</td>
<td>Parent’s Tax Form Used&lt;br&gt;Valid values include:&lt;br&gt;“1” – IRS 1040&lt;br&gt;“2” – IRS 1040A or 1040EZ&lt;br&gt;“3” – Foreign tax return&lt;br&gt;“4” – Puerto Rico, US territory, freely associated state</td>
</tr>
<tr>
<td>5</td>
<td>Parent Untaxed Income Total</td>
<td>Numeric</td>
<td>Parent’s Untaxed Income Total</td>
</tr>
<tr>
<td>5</td>
<td>Parent Additional Financial Information Total</td>
<td>Numeric</td>
<td>Parent’s Additional Financial Information Total</td>
</tr>
<tr>
<td>2</td>
<td>Parent Number in Family</td>
<td>Numeric</td>
<td>Parent’s Number in Family</td>
</tr>
<tr>
<td>2</td>
<td>Parent Number in College</td>
<td>Numeric</td>
<td>Parent’s Number in College</td>
</tr>
<tr>
<td>6</td>
<td>Student Income Work</td>
<td>Numeric</td>
<td>Student’s Income Earned from Work</td>
</tr>
<tr>
<td>6</td>
<td>Mother Income Work</td>
<td>Numeric</td>
<td>Mother’s Income Earned from Work</td>
</tr>
<tr>
<td>6</td>
<td>Father Income Work</td>
<td>Numeric</td>
<td>Father’s Income Earned from Work</td>
</tr>
<tr>
<td>4</td>
<td>Academic Year</td>
<td>Numeric</td>
<td>Award Year (all records in the file must contain the same value)&lt;br&gt;&lt;i&gt;Use ending year - if the acyear is 2011-2012 this field will contain 2012&lt;/i&gt;</td>
</tr>
<tr>
<td>6</td>
<td>Payment Term</td>
<td>Alphanumeric</td>
<td>Term being Certified (all records in file must contain the same value)&lt;br&gt;Valid values include:&lt;br&gt;“Fall” – Fall term&lt;br&gt;“Spring” – Spring term</td>
</tr>
<tr>
<td>1</td>
<td>Dependency Status</td>
<td>Alphanumeric</td>
<td>Student’s Dependency Status&lt;br&gt;Valid values include:&lt;br&gt;“D” – Dependent&lt;br&gt;“I” – Independent</td>
</tr>
<tr>
<td>6</td>
<td>School OE Code</td>
<td>Alphanumeric</td>
<td>School OE Code (all records in file must contain same value)</td>
</tr>
<tr>
<td>2</td>
<td>Terms Paid</td>
<td>Numeric</td>
<td>Prior number of terms student received payments for the aid program (paid payments greater than zero including adjustments)</td>
</tr>
<tr>
<td>1</td>
<td>Grade Level</td>
<td>Numeric</td>
<td>Student’s Grade Level&lt;br&gt;Valid values include:&lt;br&gt;“0” – 1st Year, Never Attended&lt;br&gt;“1” – 1st Year, Attended Before&lt;br&gt;“2” – 2nd Year, Sophomore&lt;br&gt;“3” – 3rd Year, Junior&lt;br&gt;“4” – 4th Year, Senior&lt;br&gt;“5” – 5th Year, Other Undergraduate&lt;br&gt;“6” – Graduate/Professional&lt;br&gt;“7” – Continuing Graduate/Professional&lt;br&gt;“8” – No Response</td>
</tr>
<tr>
<td>5</td>
<td>Award Amount</td>
<td>Numeric</td>
<td>Student’s Award Amount for the Term</td>
</tr>
</tbody>
</table>
### Upload Certification Roster

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

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

To upload the certification roster, follow these steps:

1. Select Certification from the menu. The Select Program screen is displayed.

2. Select an aid program. The Select Academic Term screen is displayed.

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

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

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

---

<table>
<thead>
<tr>
<th>MAX Len</th>
<th>Field Name</th>
<th>Type</th>
<th>Field Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>Aid Program</td>
<td>Alphanumeric</td>
<td>Aid Program being awarded (all records in file must contain same value)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Valid values include: “MASSGrant”</td>
</tr>
<tr>
<td>8</td>
<td>Certify By Date</td>
<td>Alphanumeric</td>
<td>CCYYMMDD</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Date by which the student must be certified</td>
</tr>
<tr>
<td>200</td>
<td>Prior Reject Reason</td>
<td>Alphanumeric</td>
<td>If an attempt was previously made to certify the student and they were rejected, this field will display the most recent reject reason</td>
</tr>
</tbody>
</table>
5. The Upload Certification Roster screen is displayed.

6. Click [Browse] and browse to the certification file to be uploaded, click [Open].

7. The file name will populate, click [Upload].

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

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

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

Once the file has completed, the status column will indicate the file has completed successfully or indicate there were errors. You may select the status column for additional details.
10. Users may upload another certification roster file to fix any errors reported; students with errors were not certified.

The description and layout of the certification roster download file is:

1. The format is “Comma Separated Values” (CSV)
2. All alphanumeric data types are enclosed in double quotes ("")
3. Numeric fields cannot contain decimals
4. All fields are delimited by a comma (,)
5. Carriage Return Line Feed (CRLF) at the end of each row

<table>
<thead>
<tr>
<th>MAX Len</th>
<th>Field Name</th>
<th>Type</th>
<th>Req</th>
<th>Field Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>SSN</td>
<td>Numeric</td>
<td>Y</td>
<td>Student’s Social Security Number</td>
</tr>
<tr>
<td>16</td>
<td>Last Name</td>
<td>Alphanumeric</td>
<td>Y</td>
<td>Student’s Last Name</td>
</tr>
<tr>
<td>20</td>
<td>First Name</td>
<td>Alphanumeric</td>
<td>Y</td>
<td>Student’s First Name</td>
</tr>
<tr>
<td>1</td>
<td>Middle Initial</td>
<td>Alphanumeric</td>
<td></td>
<td>Student’s Middle Initial</td>
</tr>
<tr>
<td>4</td>
<td>Academic Year</td>
<td>Numeric</td>
<td>Y</td>
<td>Award Year (all records in the file must contain the same value)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><em>Use ending year - if the acyear is 2011-2012 this field will contain 2012</em></td>
</tr>
<tr>
<td>Field Name</td>
<td>Type</td>
<td>Req</td>
<td>Field Description</td>
<td></td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------</td>
<td>-----</td>
<td>-----------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Payment Term</td>
<td>Alphanumeric</td>
<td>Y</td>
<td>Term being Certified (all records in file must contain the same value)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Valid values include:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“Fall” – Fall term</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“Spring” – Spring term</td>
<td></td>
</tr>
<tr>
<td>School OE Code</td>
<td>Alphanumeric</td>
<td>Y</td>
<td>School OE Code (all records in file must contain same value)</td>
<td></td>
</tr>
<tr>
<td>Aid Program</td>
<td>Alphanumeric</td>
<td>Y</td>
<td>Aid Program being awarded (all records in file must contain same value)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Valid values include:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“MASSGrant”</td>
<td></td>
</tr>
<tr>
<td>Certification</td>
<td>Alphanumeric</td>
<td>Y</td>
<td>Certification Status</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Valid values include:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“Y” – Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“N” – No</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“S” – No, Keep Spring</td>
<td></td>
</tr>
<tr>
<td>No Award Reason</td>
<td>Alphanumeric</td>
<td></td>
<td>Reason student is not receiving award</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Valid values include:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“N” – Not Enrolled</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“F” – Less than Full-time</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“U” – Unsatisfactory Progress</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“O” – Overaward</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“L” – Leave of Absence</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“V” – Verification Incomplete</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“T” – Other</td>
<td></td>
</tr>
<tr>
<td>School EFC</td>
<td>Numeric</td>
<td></td>
<td>School’s Expected Family Contribution</td>
<td></td>
</tr>
<tr>
<td>School Student AGI</td>
<td>Numeric</td>
<td></td>
<td>School’s Student AGI</td>
<td></td>
</tr>
<tr>
<td>School Student Taxes Paid</td>
<td>Numeric</td>
<td></td>
<td>School’s Student Taxes Paid</td>
<td></td>
</tr>
<tr>
<td>School Student Tax Form Used</td>
<td>Alphanumeric</td>
<td></td>
<td>School’s Student Tax Form Used</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Valid values include:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“1” – IRS 1040</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“2” – IRS 1040A or 1040EZ</td>
<td></td>
</tr>
<tr>
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</tr>
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<td></td>
<td></td>
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<td>School’s Parent Tax Form Used</td>
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<td>“4” – Puerto Rico, US territory, freely associated state</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>“Overaward”</td>
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</tbody>
</table>
13 Request Reinstatement

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

13.1 Request Reinstatement of Student Award

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

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

1. Select Request Reinstatement from the menu. The Select Program screen is displayed.

   ![Select Program Screen](image)

2. Select an aid program and the Select School and Term screen is displayed with the user’s school pre-populated.

   ![Select School and Term Screen](image)

3. Select a term and click [OK].

4. The Request Reinstatement screen is displayed listing all students whose days to certify expired or were previously certified as ineligible to receive funds.
5. Select one or more students for reinstatement and click [Save].

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

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

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

14.1 Online Reconciliation

Users can reconcile payments through the online reconcile payments roster.

To begin the online reconciliation process, follow these steps:

1. Select Reconcile Payments from the menu. The Select Program screen is displayed.

2. Select an aid program. The Select Payment Batch to Reconcile screen is displayed listing all payment batches disbursed for the current academic year that have not been reconciled.
3. Select the ‘Reconcile’ link for a batch. The Reconcile Payments screen is displayed.

4. To reconcile a batch of payments:
   4.1 For each student listed, select a reconciliation value:
      4.1.1 Paid Full Amount
      4.1.2 Paid Partial Amount
         4.1.2.1 Amount Paid
         
         *Note: The amount paid is required if ‘Paid Partial Amount’ is selected.*
      4.1.3 Not Paid (Full Refund)
   4.2 Click [Save].

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

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

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

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

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

To download the reconcile payments file, follow these steps:

1. Select Reconcile Payments from the menu. The Select Program screen is displayed.

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

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

4. The Verity Criteria screen displays. Verify the batch selected, click [Download File].
5. The File Request screen is displayed. Refresh the screen until the file has completed processing; indicated by a Down Arrow icon in the Download column.

6. Select the Down Arrow icon.

7. A File Download message and the File Download dialog box displays.
8. Select [Save] from the File Download dialog box. The Save As dialog box displays.

9. A default directory and file name display. Select where the downloaded file will be saved on your PC.

10. Click [Save].

11. When the download is complete, the Download Complete dialog box displays.

12. Click [Open] if you wish to view the file, or click [Close] to return to the File Requests screen.

The description and layout of the reconcile payments download file is:

1. The format is “Comma Separated Values” (CSV)
2. All alphanumeric data types are enclosed in double quotes ("")
3. Numeric fields cannot contain decimals
4. All fields are delimited by a comma (,)
5. Carriage Return Line Feed (CRLF) at the end of each row

<table>
<thead>
<tr>
<th>MAX Len</th>
<th>Field Name</th>
<th>Type</th>
<th>Field Description</th>
</tr>
</thead>
<tbody>
<tr>
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<td>SSN</td>
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<td>Student’s Social Security Number</td>
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<td>“4” – Puerto Rico, US territory, freely associated state</td>
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<td></td>
<td></td>
<td>“I” – Independent</td>
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<td>MASSAid Payment Batch Number</td>
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<td>“1” – 1st Year, Attended Before</td>
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<td>“4” – 4th Year, Senior</td>
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<td>“MASSGrant”</td>
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</tbody>
</table>
### 14.3 Upload Reconcile Payments File

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

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

To upload the reconcile payments file, follow these steps:

1. Select Reconcile Payments from the menu. The Select Program screen is displayed.

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

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

4. The Verity Criteria screen displays. Verify the batch selected, click [Upload File].
5. The Upload Reconcile Payments File screen is displayed.

6. Click [Browse] and browse to the file to be uploaded, click [Open].

7. The file name will populate, click [Upload].

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

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

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

9. Once the file has completed processing, select the ‘Status’ column, the File Processing Information screen will display.
Sample if all records processed

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

The description and layout of the reconcile payments upload file is:

1. The format is “Comma Separated Values” (CSV)
2. All alphanumeric data types are enclosed in double quotes ("")
3. Numeric fields cannot contain decimals
4. All fields are delimited by a comma (,)
5. Carriage Return Line Feed (CRLF) at the end of each row

<table>
<thead>
<tr>
<th>MAX Len</th>
<th>Field Name</th>
<th>Type</th>
<th>Req</th>
<th>Field Description</th>
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</thead>
<tbody>
<tr>
<td>9</td>
<td>SSN</td>
<td>Numeric</td>
<td>Y</td>
<td>Student’s Social Security Number</td>
</tr>
<tr>
<td>16</td>
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<td>Y</td>
<td>Award Year (all records in the file must contain the same value) Use ending year - if the acyear is 2011-2012 this field will contain 2012</td>
</tr>
</tbody>
</table>
## Field Name | Type | Req | Field Description
--- | --- | --- | ---
6| Payment Term | Alphanumeric | Y | Term being Reconciled (all records in file must contain the same value) Valid values include: “Fall” – Fall term “Spring” – Spring term
6| School OE Code | Alphanumeric | Y | School OE Code (all records in file must contain same value)
50| Batch Number | Alphanumeric | Y | MASSAid Payment Batch Number
20| Aid Program | Alphanumeric | Y | Aid Program being awarded (all records in file must contain same value) Valid values include: “MASSGrant”
1| Reconciliation | Alphanumeric | Y | Reconciliation of Student Payment Valid values include: “Y” – Yes, paid student amount indicated “N” – No, did not pay student amount indicated
7| School EFC | Numeric | | School’s Expected Family Contribution
7| School Student AGI | Numeric | | School’s Student AGI
7| School Student Taxes Paid | Numeric | | School’s Student Taxes Paid
1| School Student Tax Form Used | Alphanumeric | | School’s Student Tax Form Used Valid values include: “1” – IRS 1040 “2” – IRS 1040A or 1040EZ “3” – Foreign tax return “4” – Puerto Rico, US territory, freely associated state
5| School Student Untaxed Income Total | Numeric | | School’s Student Untaxed Income Total
5| School Student Additional Financial Information Total | Numeric | | School’s Student Additional Financial Information Total
2| School Student Number in Family | Numeric | | School’s Student Number in Family
2| School Student Number in College | Numeric | | School’s Student Number in College
7| School Parent AGI | Numeric | | School’s Parent AGI
7| School Parent Taxes Paid | Numeric | | School’s Parent Taxes Paid
1| School Parent Tax Form Used | Numeric | | School’s Parent Tax Form Used Valid values include: “1” – IRS 1040 “2” – IRS 1040A or 1040EZ “3” – Foreign tax return “4” – Puerto Rico, US territory, freely associated state
5| School Parent Untaxed Income Total | Numeric | | School’s Parent Untaxed Income Total
5| School Parent Additional Financial Information Total | Numeric | | School’s Parent Additional Financial Information Total
2| School Parent Number in Family | Numeric | | School’s Parent Number in Family
2| School Parent Number in College | Numeric | | School’s Parent Number in College
6| School Student Income Work | Numeric | | School’s Student Income Earned from Work
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<thead>
<tr>
<th>MAX Len</th>
<th>Field Name</th>
<th>Type</th>
<th>Req</th>
<th>Field Description</th>
</tr>
</thead>
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<tr>
<td>6</td>
<td>School Mother Income Work</td>
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<td>School’s Mother Income Earned from Work</td>
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<tr>
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<td>&quot;I&quot; – Independent</td>
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<td>Paid Amount</td>
<td>Numeric</td>
<td>Req if 'Reconciliation = 'N'</td>
<td>School's Paid Amount</td>
</tr>
<tr>
<td>20</td>
<td>Reason Paid Amount Lowered</td>
<td>Alphanumeric</td>
<td></td>
<td>Reason paid amount was lowered by school Valid Values include:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>&quot;EFC Change&quot;</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>&quot;Overaward&quot;</td>
</tr>
</tbody>
</table>
15 File Requests

File Requests displays all files that have been uploaded or downloaded by the school. All files are available and can be accessed at any time.

15.1 View Requested Files

Users can access files previously requested and re-download them.
To view requested files, follow these steps:

5. Select File Requests from the menu. The File Requests screen is displayed.

<table>
<thead>
<tr>
<th>File Type</th>
<th>Request Date</th>
<th>Status</th>
<th>User Name</th>
<th>Aid Program</th>
<th>Term</th>
<th>Download</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download MASSGrant Information Roster</td>
<td>05-25-2011</td>
<td>The File has completed successfully</td>
<td>igrahammass5000</td>
<td>MASSGrant</td>
<td>Fall</td>
<td></td>
</tr>
<tr>
<td>Download MASSGrant Information Roster</td>
<td>05-25-2011</td>
<td>The File has completed successfully</td>
<td>igrahammass5000</td>
<td>MASSGrant</td>
<td>Fall</td>
<td></td>
</tr>
</tbody>
</table>

6. To view the details of a file, select the row associated to the file request.
   6.1 The File Processing Information screen is displayed.

   6.2 Click [File Requests] to return to the File Requests screen.

7. To re-download a file, select the Down Arrow icon.
   7.1 A File Download message and the File Download dialog box displays.
7.2 Select [Open] from the File Download dialog box to view the file.

7.3 Select [Save] from the File Download dialog box to save the file.

7.3.1 The Save As dialog box displays.

7.3.2 A default directory and file name display. Select where the downloaded file will be saved on your PC.

7.3.3 Click [Save].

7.3.4 When the download is complete, the Download Complete dialog box displays.

7.3.5 Click [Open] if you wish to view the file, or click [Close] to return to the File Requests screen.
16 Owe Refund Students

Schools report students who owe a refund on state financial aid. Agency and school users can manage these students.

16.1 Search Owe Refund Students

Users can manage students who owe a refund.

To search students who owe a refund, follow these steps:

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

2. Enter one or more search criteria:
   2.1 Full or partial last name
   2.2 Full or partial first name
   2.3 SSN

3. Click [Search]; students matching your search results are displayed.

   Note: School users will only get results back on students attending their school.
To update a student who owes a refund, follow these steps:

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

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

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

3. Click [Save].

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

### 16.1.2 Add New Owe Refund Student

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

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

2. Enter the following (required fields in **bold**):
2.1 **SSN**
2.2 **First Name**
2.3 **Last Name**
2.4 **Middle Initial**
2.5 **Date of Birth**
2.6 **Address**
2.7 **Address2**
2.8 **City**
2.9 **State**
2.10 **Zip Code**
2.11 **Refund Amount Owed**

3. Click [Save].

The student is added as owing a refund at the user’s school and student eligibility is re-determined (if applicable).
17 Send Email

17.1 Send E-mail to Agency

MASSAid allows you, as school users, to communicate via email with the agency. To send an email, follow these steps:

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

![Send E-mail to Agency](image)

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

2. Select an aid program

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

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

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