Version	**1.0**
Document Generation Date	**6/16/2008**
Date Modified	**6/30/2008**
Last Changed by	**ASDS**
Status	**Draft**

Pell Origination

Concept

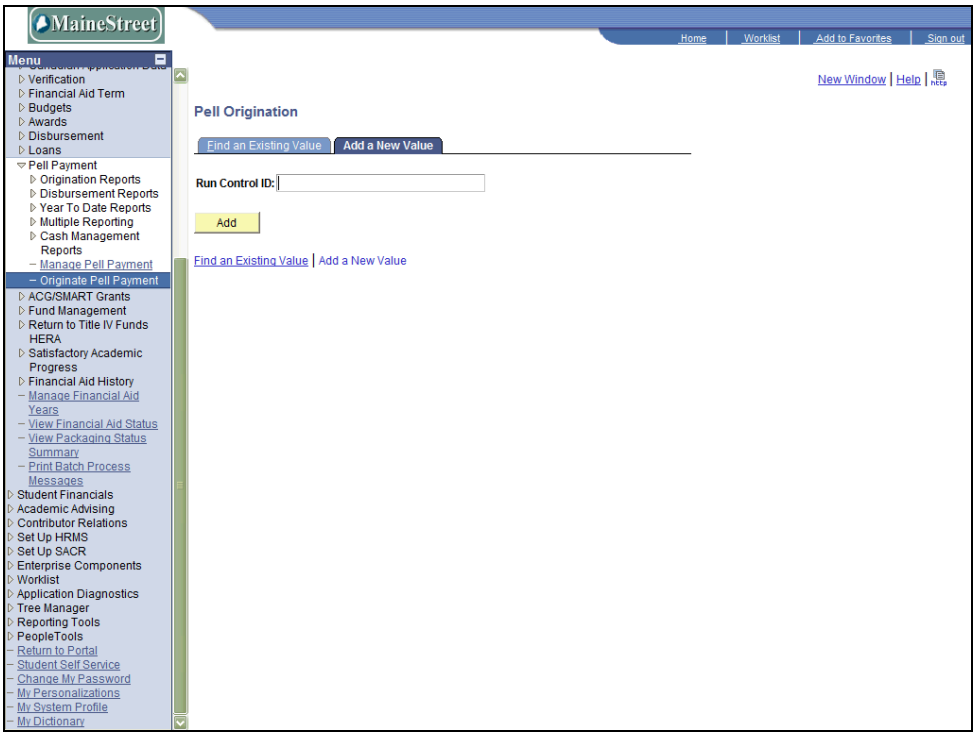
The Pell process begins with the submission of an origination record generated by the Originate Pell Payment component. The origination record establishes a student's eligibility for a specific annual award of federal Pell Grant program funds. It includes the student's annual amount calculated by your institution and cost of attendance.

The Pell origination process creates a unique ID for the student, sets the Pell processing status to Send, sets the Pell transaction status to Ready, and displays the date and time when the process was run. You can use the Manage Pell Payment component to review and update information on the Pell process for a student.

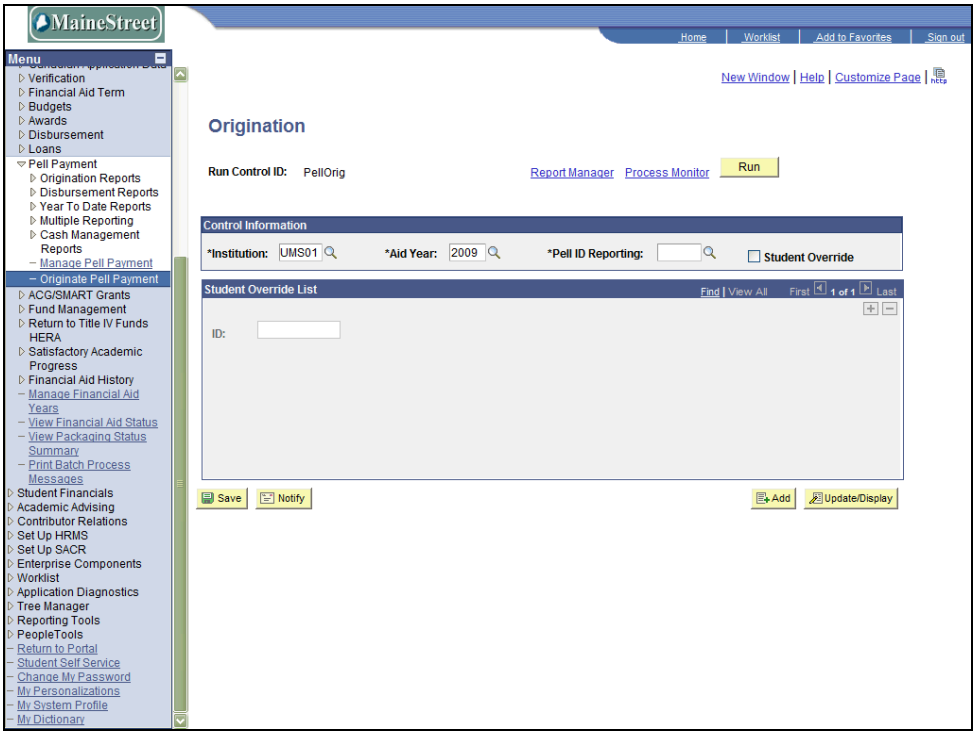
Once the origination records have been created, an outbound file is generated that may be downloaded for transmission to COD. When the COD response file is received, a process is run to import the data. In this topic, we cover the Originate Pell Payments and Manage Pell Payments components. For outbound and inbound file processing please refer to those topics.

Procedure

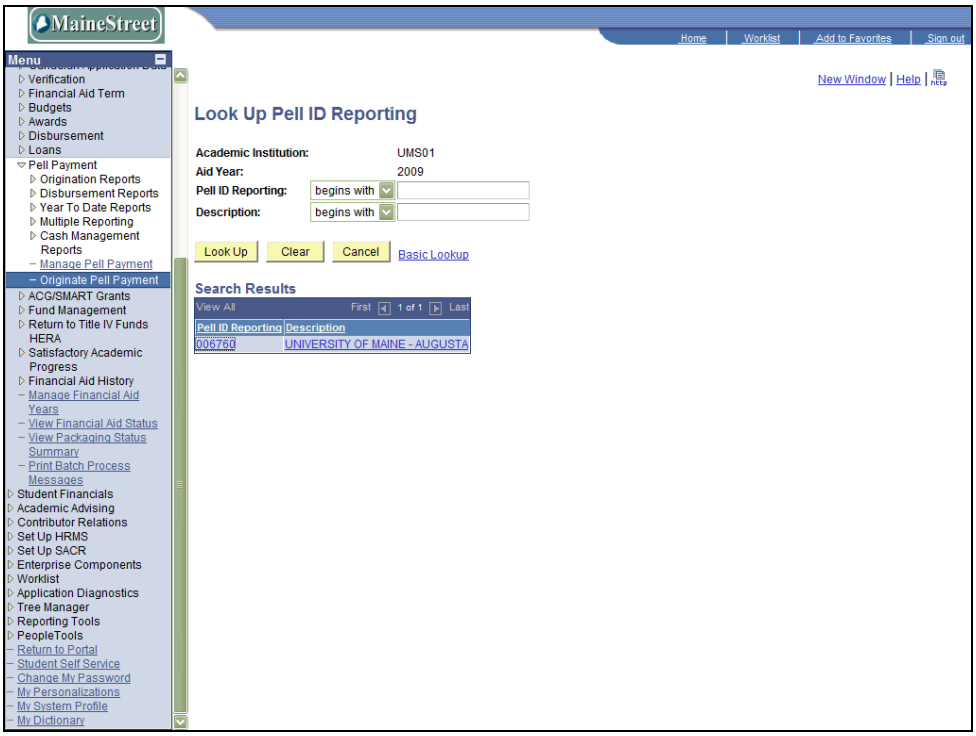
Step	Action
1.	Navigate: **Financial Aid > Pell Payment > Originate Pell Payment.**
2.	A **Run Control ID** is an identifier you create for a process. The Run Control ID stores your parameter settings. In this way, you do not need to reenter the parameters the next time you run the process. Also if the process is run in the background as a scheduled job, the system does not have to prompt you for the settings. You can either select an existing Run Control ID or create a new one. To create a new one, click the **Add a New Value tab**.



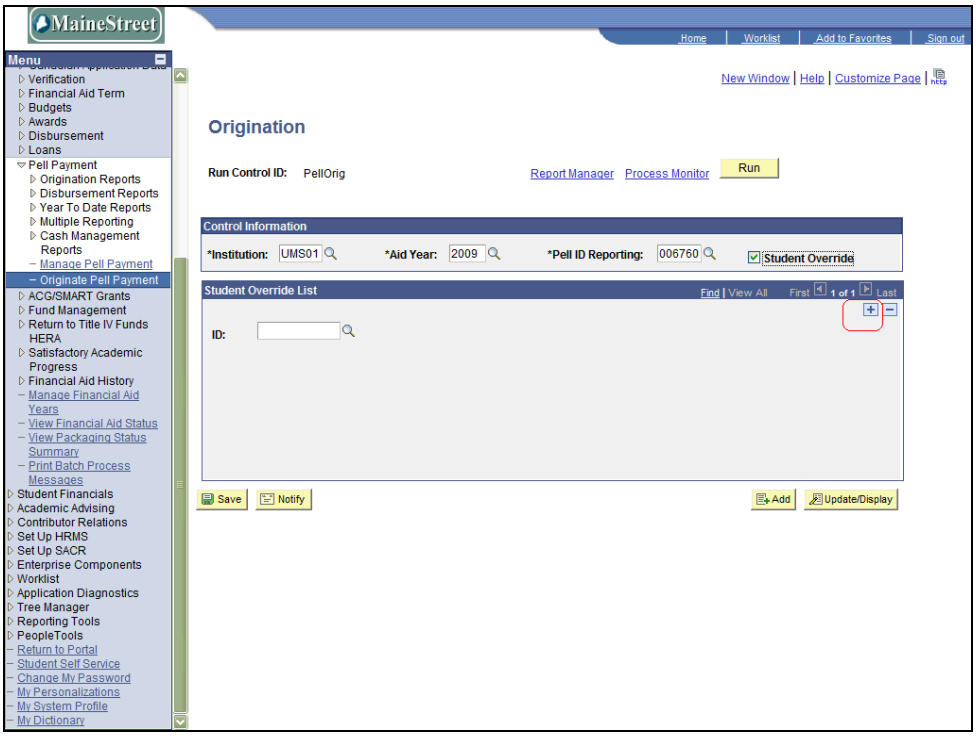
Step	Action
3.	Enter a name for the new Run Control ID (do not use blanks).
4.	Click **Add.** Add



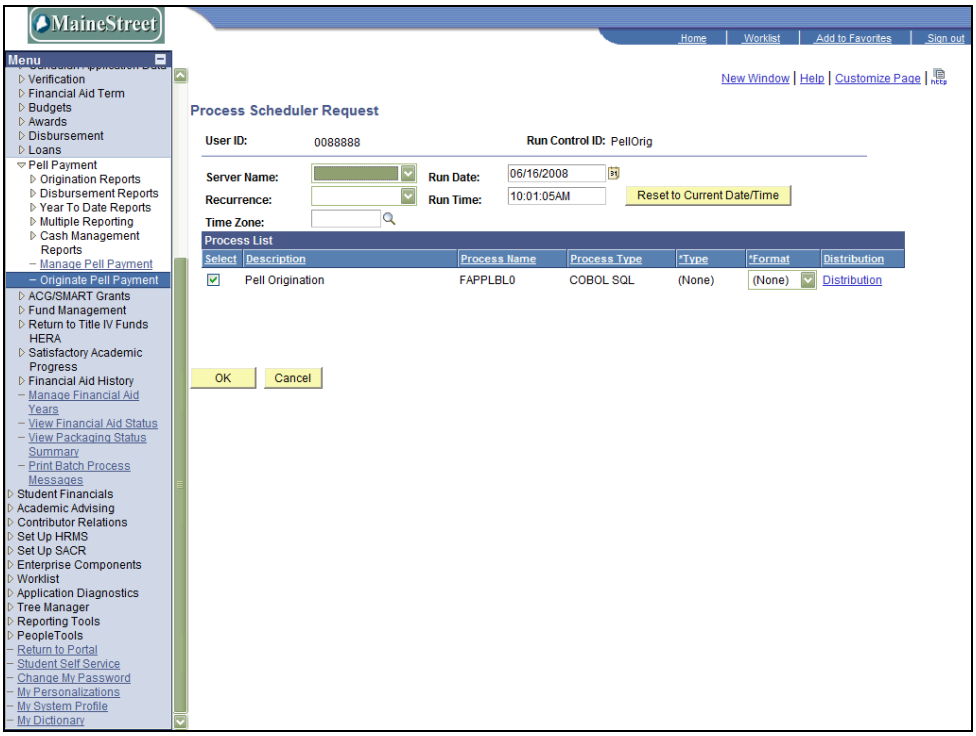
Step	Action
5.	The parameters for this process are: **Institution**, **Aid Year** and **Pell ID Reporting** (required) and optionally a list of student IDs. The process looks at all students at the Institution and Aid Year specified, who have a Pell award with status "Pending" and Pell transmit status "Ready."
6.	Make sure the correct **Institution** and **Aid Year** are entered. Click the look up button on the **Pell ID Reporting** field.



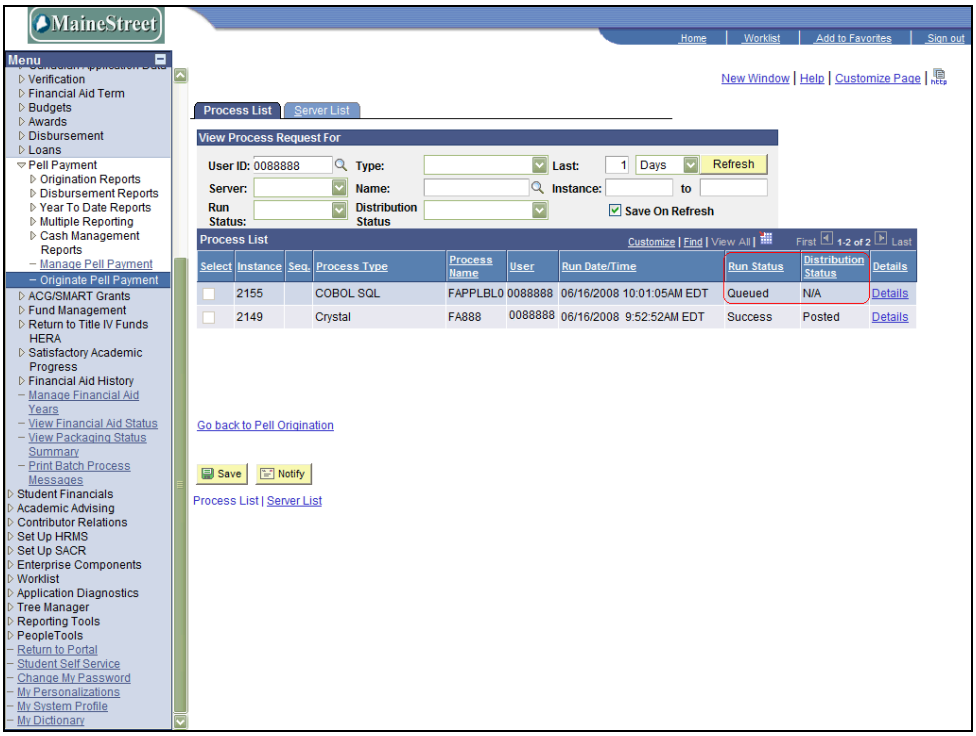
Step	Action
7.	Click the correct Pell ID from the Search Results list. 006760 UNIVERSITY OF MAINE - AUGUSTA

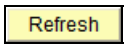


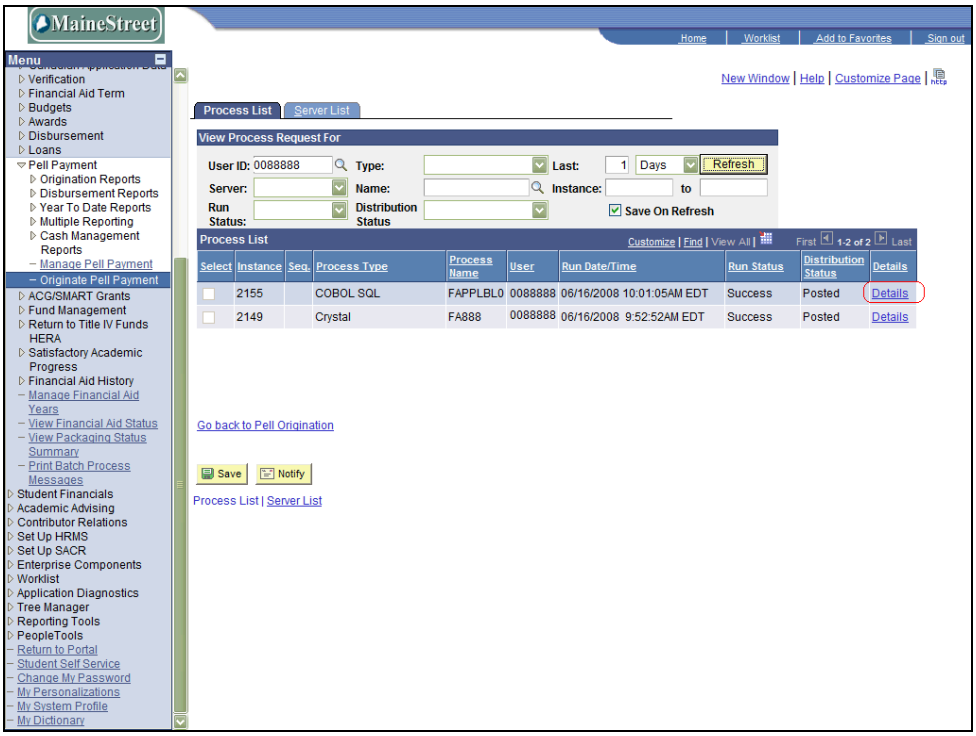
Step	Action
8.	If you want to limit the process to specific students, click the **Student Override** checkbox as shown in this example. This opens up the **ID** field in the **Student Override List** section of the page. Enter a student's ID in the **ID** field. Click the **Add a New Row** button to add more student IDs. If you do not use the **Student Override** checkbox to list particular students, the process will evaluate all students.
9.	Click **Run** Run



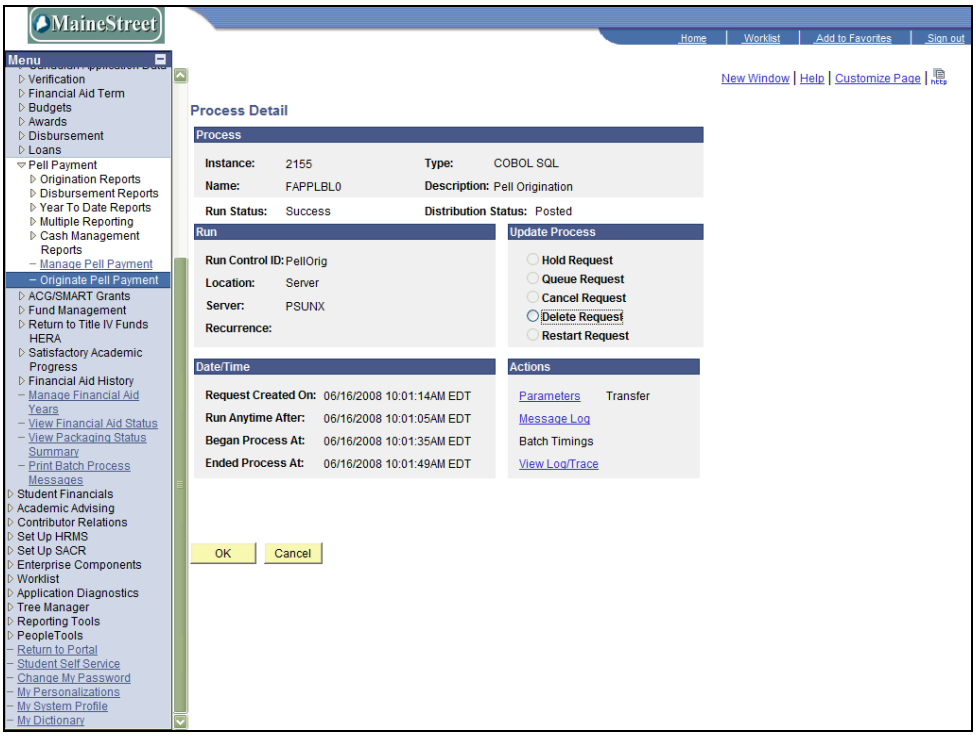
Step	Action
10.	Click **OK**. OK
11.	Click the **Process Monitor** link. Process Monitor



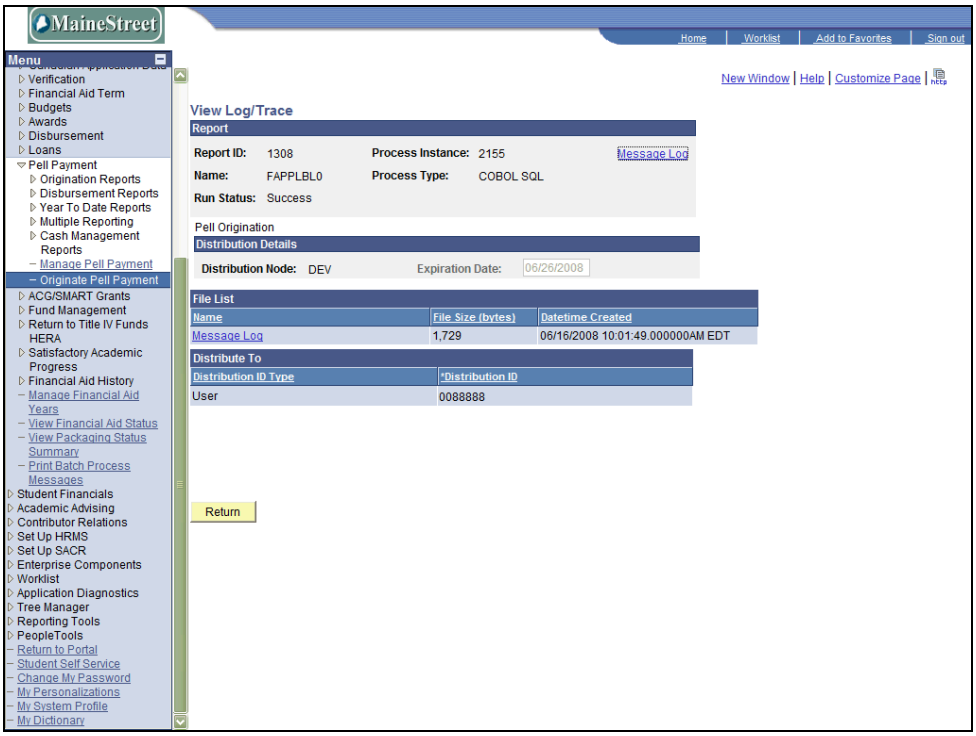
Step	Action
12.	The current process is always the topmost one in the list. Click the **Refresh** button from time to time until the **Run Status** is ***Success*** and the **Distribution Status** is ***Posted***. 



Step	Action
13.	Click the **Details** link. Details



Step	Action
14.	Click **View Log/Trace**. View Log/Trace



Step	Action
15.	To see messages from the process, click the **Message Log.** Message Log

```
Run Control ID[      ]: PellOrig

Process Instance:[0]:2155

SQL Trace:[0]:

DB Flag:[0]:0

> 2008-06-16-10.01.36.010000 INFO(14425,40) PI(2155) Program(FAPPLBL0)
FAPPLBL0 : Begin Execution at 10.01.34.980000 on 2008-06-16
COMMIT LEVEL = 00500
> 2008-06-16-10.01.36.410000 INFO(14425,42) PI(2155) Program(FAPPLBL0)
FAPPLBL0: Pell Origination Beginning for UMS01, 2009, 006760
> 2008-06-16-10.01.38.530000 INFO(14425,43) PI(2155) Program(FAPPLBL0)
FAPPLBL0: Pell Origination Ending for UMS01, 2009, 006760
> 2008-06-16-10.01.38.540000 INFO(14425,53) PI(2155) Program(FAPPLBL0)
FAPPLBL0: Total Students with new Pell Origination:      4
> 2008-06-16-10.01.38.550000 INFO(14425,54) PI(2155) Program(FAPPLBL0)
FAPPLBL0: Total Students with Pell Origination Adjustments:      0
> 2008-06-16-10.01.38.560000 INFO(14425,41) PI(2155) Program(FAPPLBL0)
FAPPLBL0 : End Execution at 10.01.38.560000 on 2008-06-16
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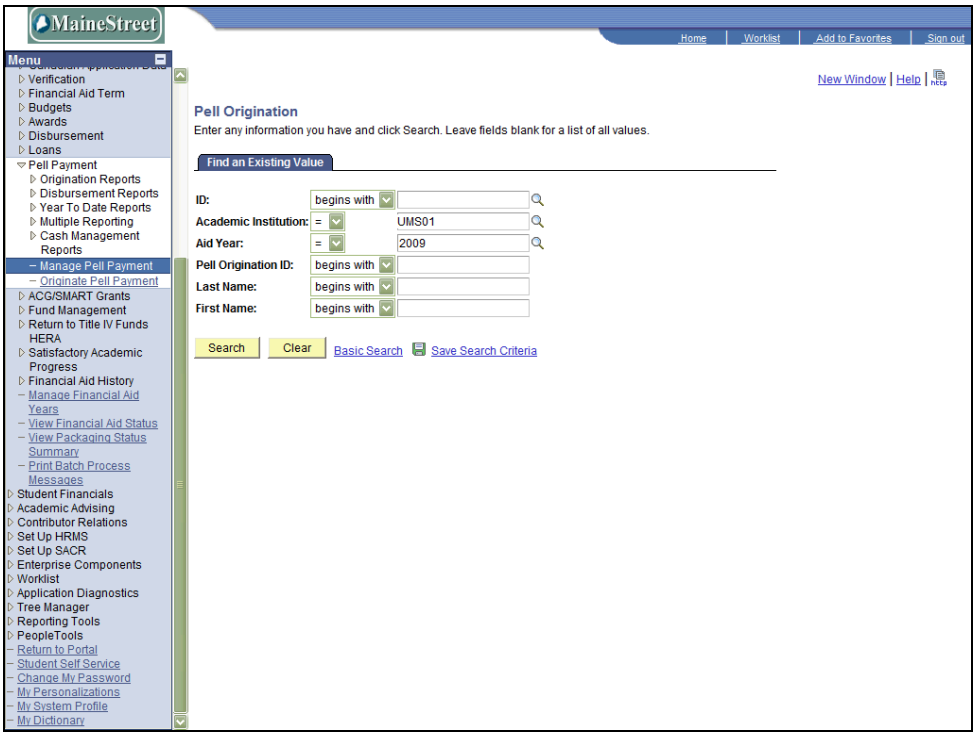
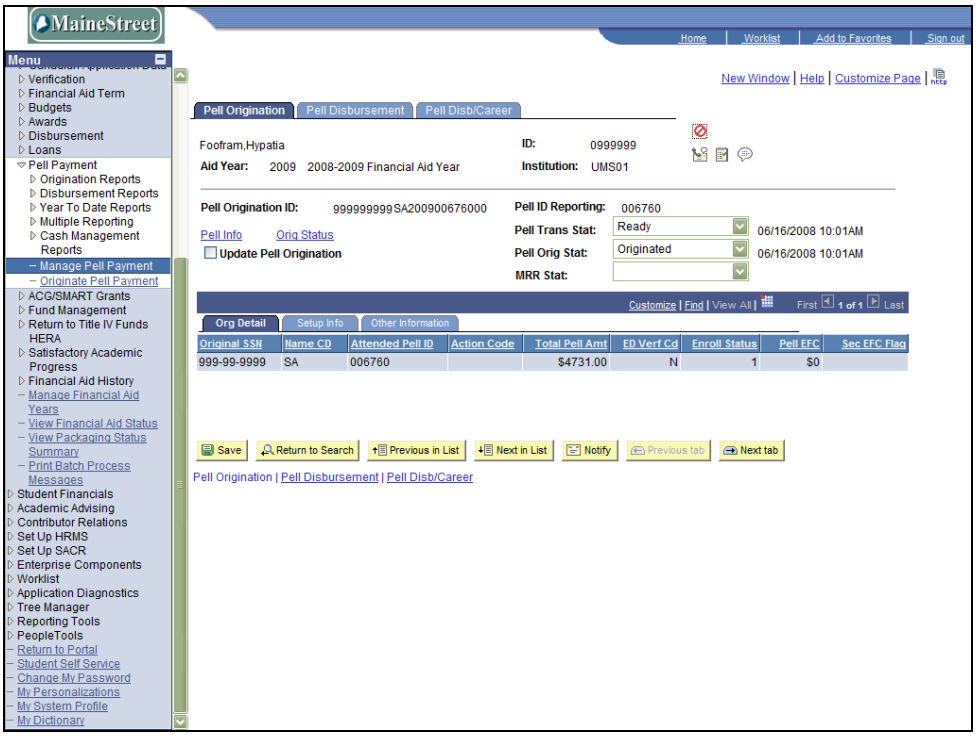
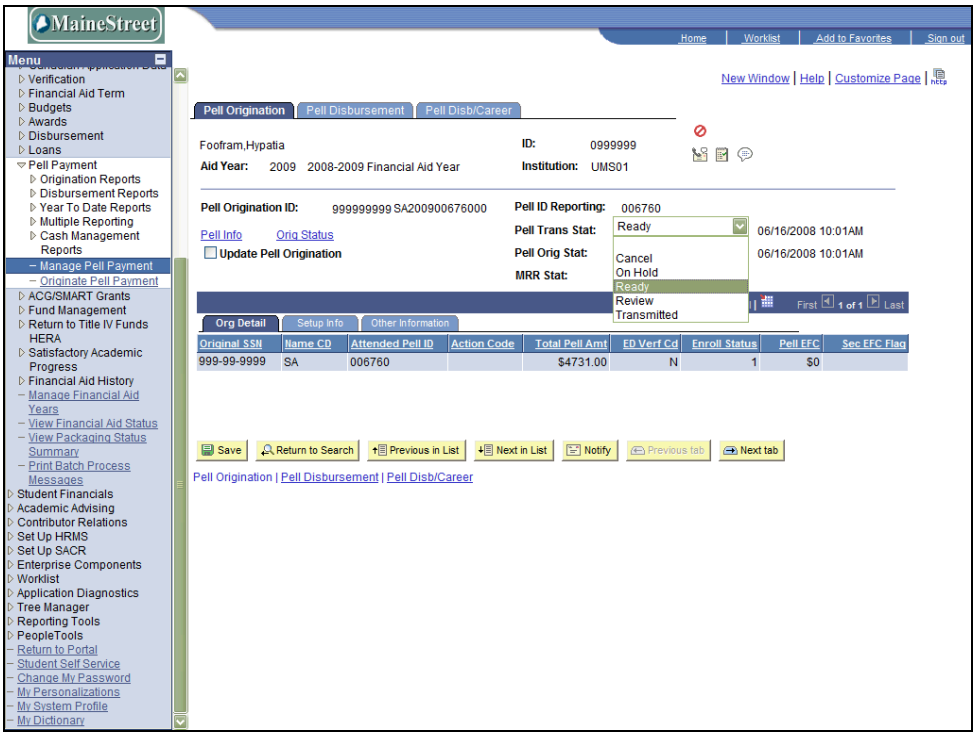
Step	Action
16.	The Message Log opens in a new window. In the example shown, the Message Log tells you that 4 students had their Pell awards originated.



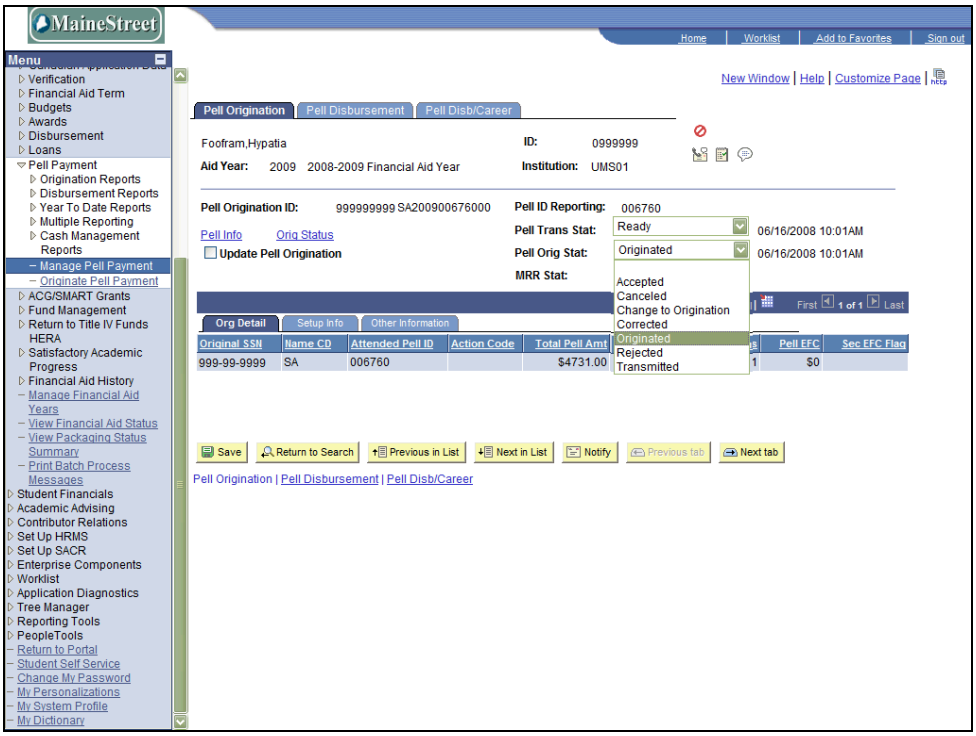
Step	Action
17.	To review the Pell origination data and perhaps to modify it, click the **Manage Pell Payment** link in the menu. (Full navigation: **Financial Aid > Pell Payment > Manage Pell Payment.)** On this page, enter the **Institution** and **Aid Year** plus any search criteria to identify a student. Click **Search**.



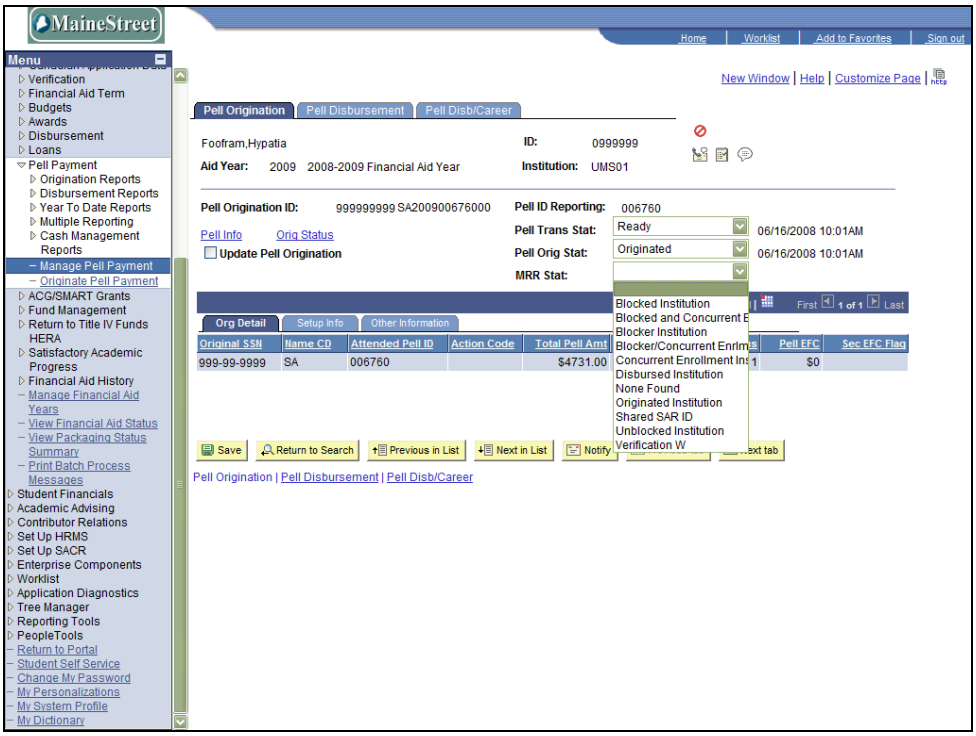
Step	Action
18.	Use the links and tabs on this page to review the student's Pell information.



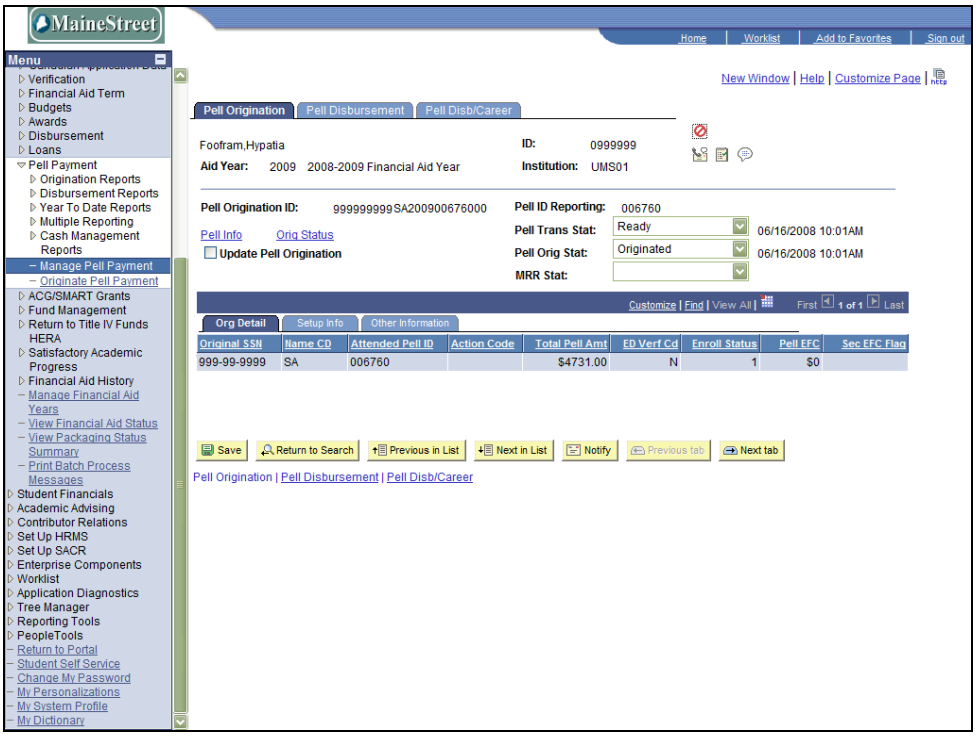
Step	Action
19.	You can change the **Pell Transaction Status**. Click the pull-down menu to see the choices. For example, if you receive a rejected record, the Pell Trans Status will be ***On Hold***. You can correct the record and change the status to ***Ready*** and resend the origination.



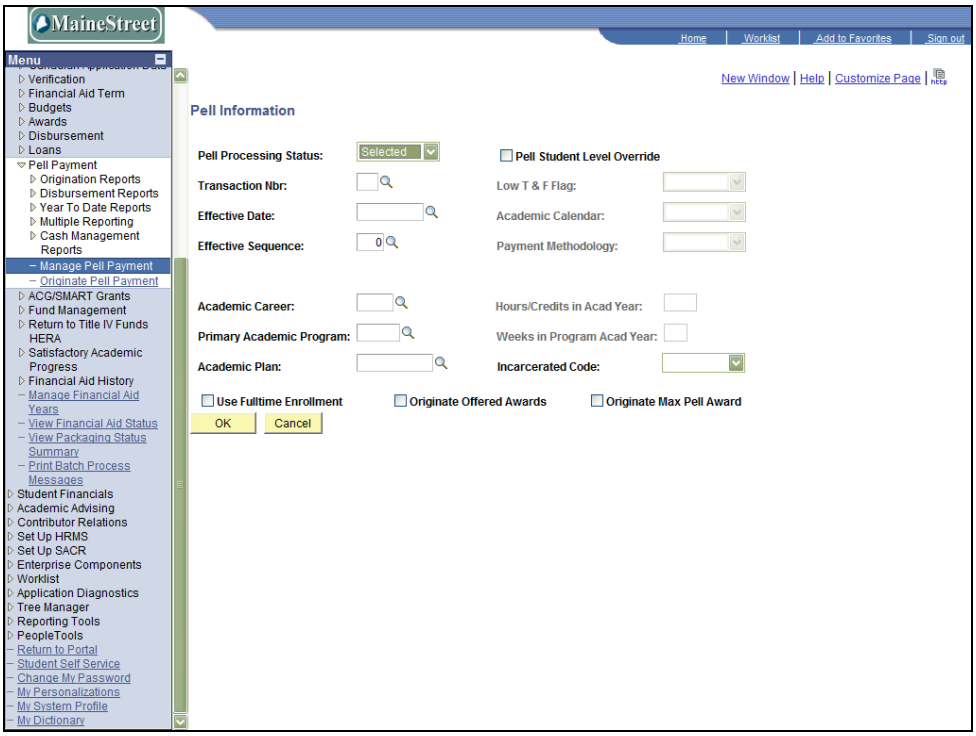
Step	Action
20.	Click the pull-down **Pell Orig Stat** menu to see the choices for Pell Origination Status. ***Originated*** means origination was successful. ***Accepted*** indicates an accepted acknowledgment record. ***Canceled*** indicates a cancelled Pell award. Run origination again to resend. ***Change to Origination*** indicates that a change was made to the student's origination record. This occurs if you cancel an award or if you select the student's record using the **Update Pell Origination** check box. ***Corrected*** indicates an accepted record with corrections. ***Rejected*** indicates a rejected record. If the record is rejected, the system sets the processing status to ***Review*** and the transmitted status to ***On Hold***. ***Transmitted*** indicates that a transmit record has been built and can be exported. A corresponding response record for the student must be received before you can run another process for the student.



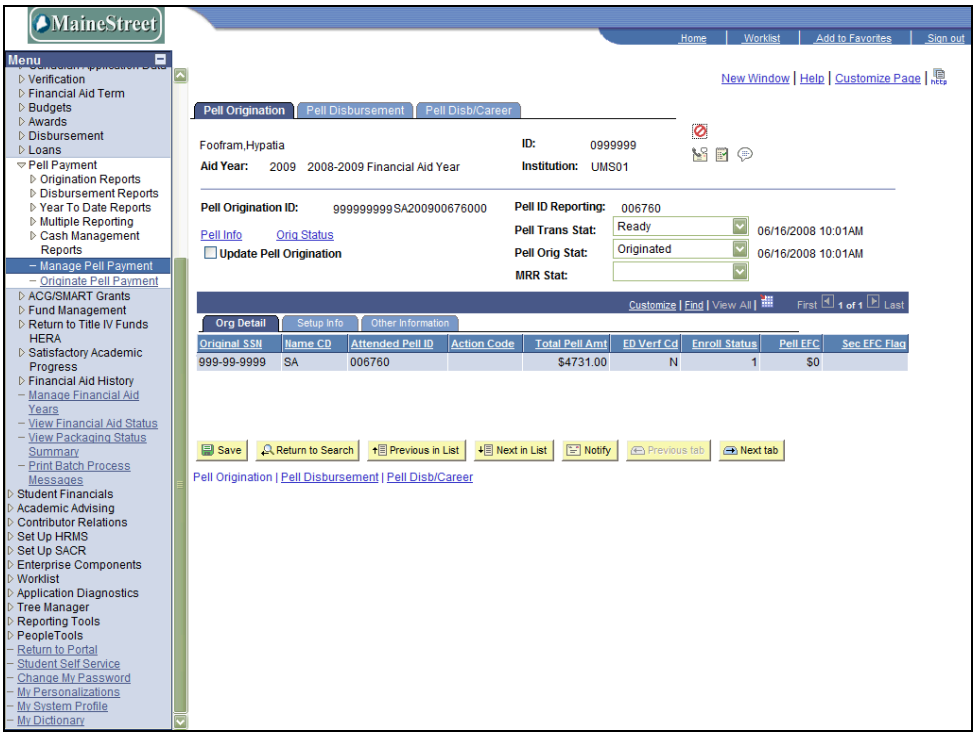
Step	Action
21.	The **MRR Stat** field displays originations and disbursements reported by more than one institution for the student. This field is updated when you request multiple reporting records and load them.



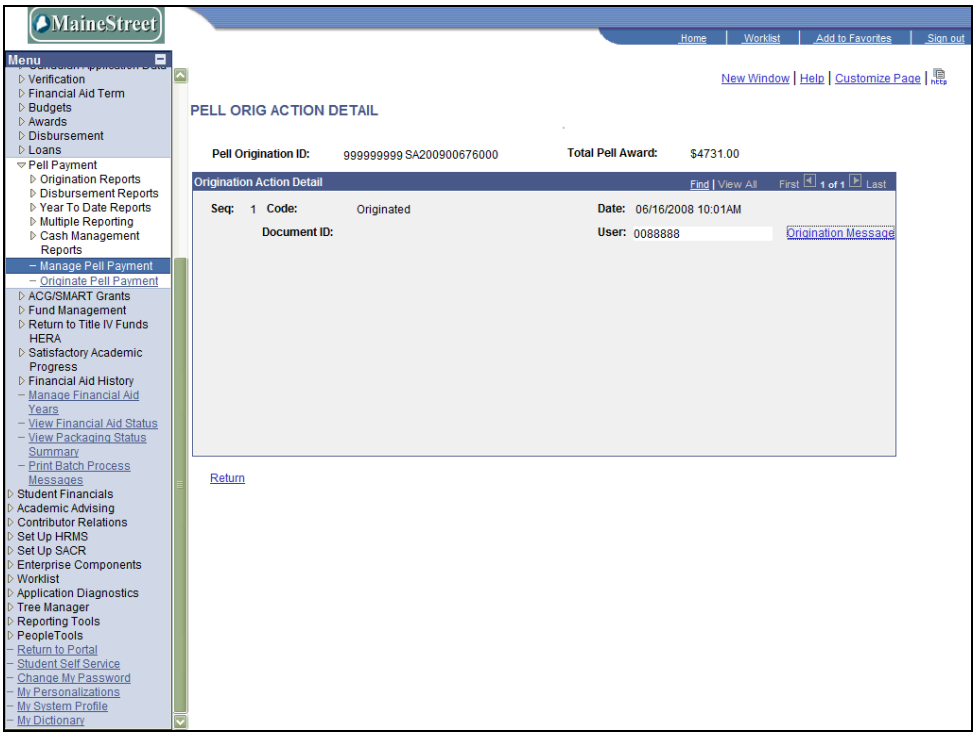
Step	Action
22.	Click the **Pell Info** link to see the Pell Information page. Pell Info
23.	On this page you can override transaction data. Before Pell processing, the Pell Processing Status is ***Pending***. If the process is successful, the status is changed to ***Selected***. When the record is included in an outbound file, the status is changed to ***Reported.***



Step	Action
24.	Click **OK** or **Cancel** to return to the main page. OK Cancel

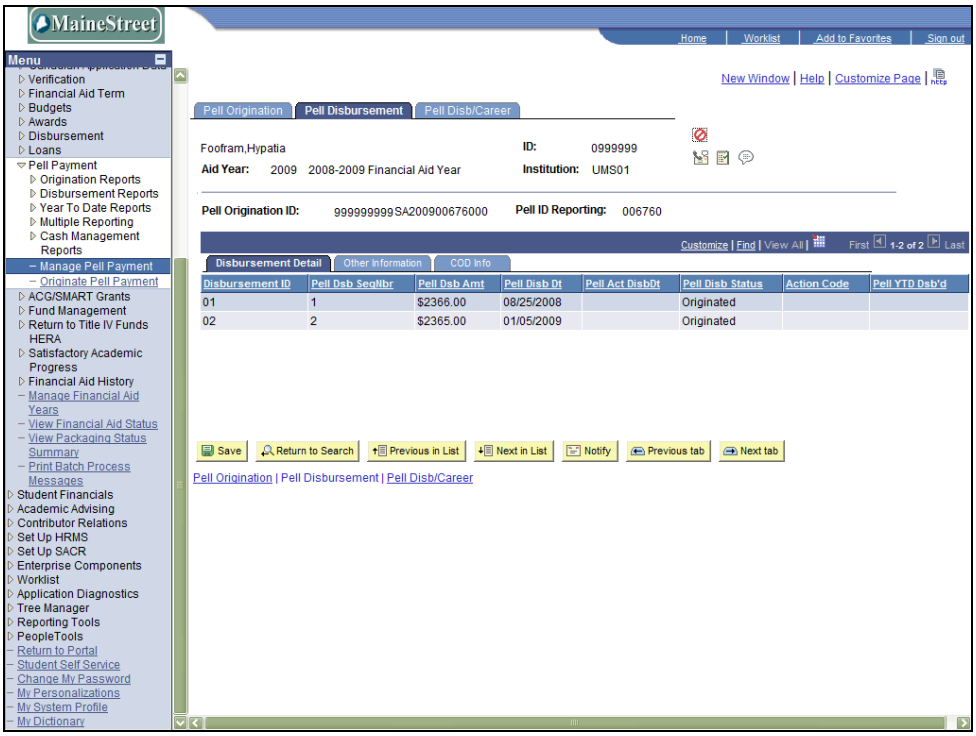


Step	Action
25.	Click the **Orig Status** link. Orig Status

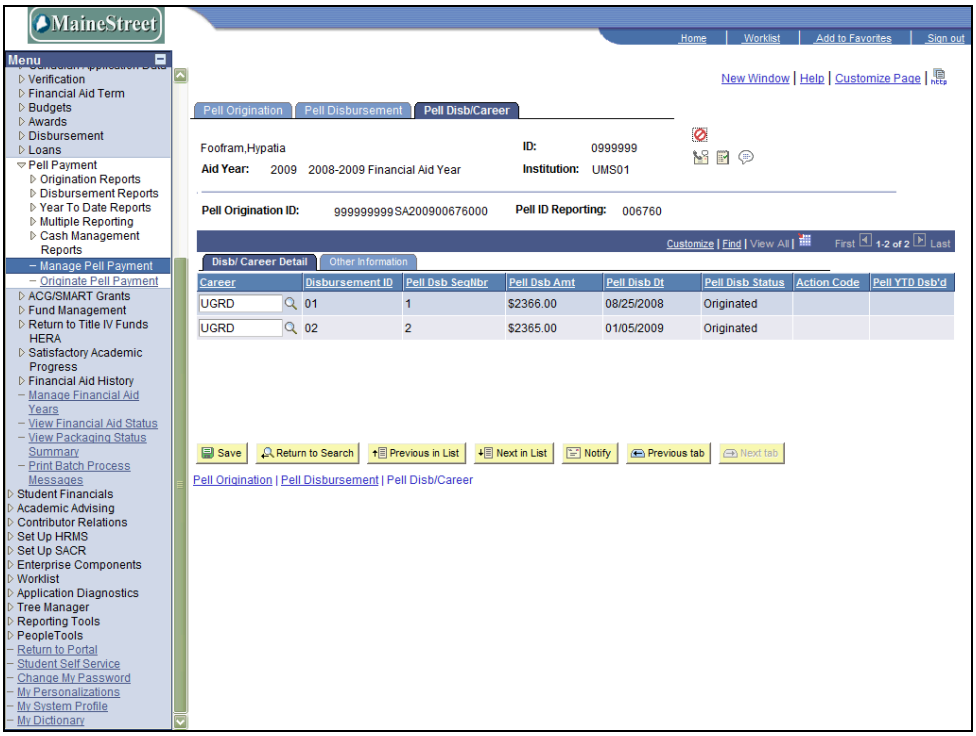


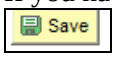
Step	Action
26.	The **Pell Origination Action Detail** page displays the history of the student's origination record. A sequence is added for each action, starting with 1 for the initial origination process. Click the **Origination Message** link to view Pell origination action messages. Origination Message
27.	Click **Return.** Return
28.	Select the **Update Pell Origination** checkbox to change the Pell processing status back to ***Pending***. This will cause origination for this student to be rerun.
29.	On the **Orig Detail** tab, the **Action Code** is set by the acknowledgement record to: A: all fields accepted, C: one or more fields corrected, D: duplicate, E: record was rejected.
30.	Click the **Setup Info** and Other Information tabs for more reported data.

Step	Action
31.	Click the **Pell Disbursement** tab Pell Disbursement



Step	Action
32.	Use the **Pell Disbursement** page to view details about disbursement including dates, status, etc.
33.	Click the **Pell Disb/Career** tab. Pell Disb/Career



Step	Action
34.	If you have made any changes, click **Save**. 
35.	**End of Procedure.**