## 9.2 Manage Pell Origination

**Purpose:** Use this document as a reference on how to manage the Pell Origination process using ctcLink.

Audience: Financial Aid staff

Use the Pell Origination page to review results of Pell origination.

• You must have at least one of these local college managed security roles:

- ZD FA Director
- ZD FA Pell Prcs
- ZD FA Pell Pymnt Prcs
- ZZ FA Pell Prcs
- ZZ FA Pell Processor

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

## **Manage Pell Origination**

## Navigation: NavBar > Navigator > Financial Aid > Pell Payment > Manage Pell Payment

- 1. The Pell Origination search page displays.
- 2. Enter the **ID**.
- 3. Enter Academic Institution.
- 4. Enter Aid Year.
- 5. Select the **Search** button.

Pell Origination
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value
Search Criteria
ID begins with V 201251644 Q
Academic Institution = V WA171 Q
Aid Year = 🗸 2018 Q
Pell Origination ID begins with 🗸
Last Name begins with V
First Name begins with V
Search Clear Basic Search 🖾 Save Search Criteria
No matching values were found.

- 6. The Pell Origination tab displays.
- 7. Use the Pell Information page to review or change the Pell processing status.
- 8. The **Pell Trans Stat** (Pell transaction status) field is set to **Ready** if the Generate Pell Data process has not been run yet. Otherwise, the status should say **Transmitted**, indicating that the COD XML file has been created for this record during the Generate Pell Data process.
- 9. The **Pell Orig Stat** (Pell origination status) field is set to **Originate** if the Generate Pell Data process has not be run yet. Otherwise, the status should say **Transmitted**, indicating that the COD XML file has been created for this record during the Generate Pell Data process.
- 10. Select the **Pell Info** link.

Wa	atson, Noel Aid Year 2018	2017-2018 Financ	ial Aid Year		ID 2012 Institution WA1	251644 🧐	*		
	Pel	I Origination ID 66	4626838CH2012012	251644	Pell II	Reporting 003793			
	Pell Info	Orig	Status		Pell Tra	nsac Status Ready		× 04	/30/2018 3:10PM
	Update Pe	II Origination			Pell Origina	ation Status Accepted		× 04	/30/2018 3:10PM
					Pell	MRR Status		$\sim$	
						Personalize   Find   View All	2 🔣	First 🕚	1-2 of 5 🛞 Last
Org Detail	Setup Info	Other Information							
riginal SSN	Name Code	Attended Pell ID	Action Code	Total Pell	Additional Pell	ED Verification Status Code	Pell EFC	Sec EFC	Citizen Ovrd
03-14-7362	CH	003793	Accepted	\$5920.00	N	N	\$0		
03-14-7382	CH	003793	Accepted	\$5920.00	N	N	\$0		

- 11. The Pell Information page displays.
- 12. Select the **OK** button.

Pell Information		
Pell Processing Status Reported to ED	Pell Student Level Override	
Transaction Num	Low T & F Flag	$\sim$
Effective Date	Academic Calendar	~
Effective Sequence 0	Payment Methodology	$\checkmark$
Academic Career	Hours/Credits in Acad Year	
Primary Academic Program	Weeks in Program Acad Year	
Academic Plan	Incarcerated Code	~
OK Cancel	□ Originate Offered Awards □ Origin	nate Max Pell Award

- The Pell Origination tab displays.
   Select the **Orig Status** link.

	<b>★</b> ፼ (₽)	251844 🤗 1 171	ID 2012 Institution WA1		cial Aid Year	2017-2018 Financ	tson, Noel Aid Year 2018	Wa
		O Reporting 003793	Pell ID	51644	64626838CH2012012	Il Origination ID 6	Pel	
04/30/2018 3:10PM		nsac Status Ready	Pell Tran		g Status	Ori	Pell Info	
04/30/2018 3:10PM		ation Status Accepted	Pell Origina			ell Origination	Update Pe	
		MRR Status	Pell N					
🚯 1-2 of 5 🕑 Las	2   🔣 F	Personalize   Find   View All						
🐠 1-2 of 5 🛞 Las	🗐 🔣 F	Personalize   Find   View All				Other Information	Setup Info	Org Detail
<ul> <li>1-2 of 5 E Las</li> <li>C Citizen Ovn</li> </ul>	Pell EFC S	Personalize   Find   View All ED Verification Status Code	Additional Pell	Total Pell	Action Code	Other Information Attended Pell ID	Setup Info Name Code	Org Detail Driginal SSN
<ul> <li>1-2 of 5 <ul> <li>Las</li> <li>C Citizen Ovr</li> <li></li></ul></li></ul>	Pell EFC S	Personalize   Find   View All ED Verification Status Code N	Additional Pell N	Total Pell \$5920.00	Action Code Accepted	Other Information Attended Pell ID 003793	Setup Info Name Code CH	Org Detail Driginal \$\$N 203-14-7362

- 15. The Pell Orig Action Detail page displays.
- 16. Select the **Return** link.

PE	ELL ORIG ACTI	ON DETAIL		
		Pell Origination ID 664626838CH201201251644	Total Pell Award \$6907.00	
	Pell Origination	n Action Detail		Find   View All First 🚯 1 of 1 🛞 Last
	Seq	Code:	Date	
		Document ID:	User CTC_JMERRILL	Origination Message
-				
L	Return			

- 17. The Pell Origination page displays.
- 18. Select the **Setup Info** tab.
- 19. The Setup Info data displays.
- 20. It shows additional origination information, such as the first date on which the student was enrolled in an eligible program, if the tuition and fees are low (low T&F flag), and the COA used to calculate the Pell award amount.

Pell Origination Watso Aio	Pell Djsb on, Noel d Year 2018	2017-2018 Finance	ial Aid Year		ID 201251644 Institution WA171	0 14	★ ፼ ⊚	
	Pe	II Origination ID 66	4626838CH201201	251644	Pell ID Reporti	ng 003793		
P	ell Info	Orig	) Status		Pell Transac Stat	us Ready		04/30/2018 3:10PM
[	Update P	ell Origination			Pell Origination Stat	Accepted		✓ 04/30/2018 3:10PM
					Pell MRR Stat	us		✓
					Perso	nalize   Find   View All	💷   🔜 🛛 Fi	irst 🕚 1-2 of 5 🕑 Last
Org Detail S	etup Info	Other Information	[TTT]					
Pell Enroll Dt		Low T & F Flag	Trans Num	Pay Method	Pell COA	Sched Pell	Weeks Calc	Weeks Acad Yr
07/03/2017			1		\$17717.00	5920		
07/03/2017			1		\$17717.00	5920		
	leturn to Sea	rch 🖹 Notify						

- 21. Select the **Other Information** tab.
- 22. The **Other Information** tab displays.
- 23. It has additional origination information, such as the incarceration status (IncarcerCd), or, if a change has been made, any previous ISIR transaction, EFC, secondary EFC, or COA.

Pell Origination         Pell Djsbursement         Pell Djsb/Career           Watson, Noel         Aid Year         2018         2017-2018         Financial Aid Year	ID 201251844 Institution WA171	<mark>⊘ ★</mark> ₩ ₩ ©	
Pell Origination ID 664626838CH201201251644	Pell ID Reporting 003793		
Pell Info Orig Status	Pell Transac Status Ready	· · · · · · · · · · · · · · · · · · ·	04/30/2018 3-10PM
Update Pell Origination	Pell Origination Status Accepted	· · · · · · · · · · · · · · · · · · ·	04/30/2018 3:10PM
	Pell MRR Status	· · · · · · · · · · · · · · · · · · ·	2
Org Detail Setup Info Other Information	Personalize	Find   View All   🔄   🔜	First 🕚 1-2 of 5 🕑 Last
Hours Credits Paid Hours Credits In Acad Yr Incarcerated Code Acad Calendar	Ed Flags Prev I SIR Transac	Prev EFC Prev Sec E	EFC Code Prev COA ATB
	Ed Flags		ATB
	Ed Flags		ATB
Return to Search Source Notify Pell Origination   Pell Disbursement   Pell Disb/Career			

- 24. Select the **Pell Disbursement** Tab.
- 25. The Pell Disbursement tab displays.
- 26. Review the **Disbursement Detail** tab information.

Watson, No Aid Yea	oel r 2018 201	7-2018 Financia	al Aid Year	h	ID 20125164 nstitution WA171	4		
	Pell Origination	on ID 6646268	38CH2012012516	44				
Disbursement D	etail <u>C</u> OD	Info 💷			Personal	ize   Find   View	All 🖓 🎫 I	First 🖤 1-6 of 6 🖤 Last
Item Type	Disbt ID	Pell Disbt Amount	Pell Disbt Date	Pell Actual Disbt Date	Pell Disbt Status	Action Code	Pell YTD Disbt	
			0010010047	07/02/2017	Disburged	Assessed	2027.00	Dishumon at Datail
911000000000	01	\$987.00	06/23/2017	01102/2011	Disburseu	Accepted	9867.00	Dispursement Detail
911000000000	01	\$987.00 \$1973.00	09/10/2017	09/14/2017	Disbursed	Accepted	\$2960.00	Disbursement Detail
911000000000 911000000000 911000000000	01 02 03	\$987.00 \$1973.00 \$1974.00	09/10/2017	09/14/2017	Disbursed	Accepted Accepted	\$2960.00 \$4934.00	Disbursement Detail Disbursement Detail Disbursement Detail
911000000000 911000000000 911000000000 91100000000	01 02 03 04	\$987.00 \$1973.00 \$1974.00 \$986.00	09/10/2017 09/10/2017 12/24/2017 03/23/2018	09/14/2017 12/27/2017 03/27/2018	Disbursed Disbursed Disbursed Disbursed	Accepted Accepted Accepted	\$2960.00 \$4934.00 \$5920.00	Disbursement Detail Disbursement Detail Disbursement Detail
91100000000 91100000000 91100000000 91100000000	01 02 03 04 04	\$987.00 \$1973.00 \$1974.00 \$986.00 \$-986.00	08/23/2017 09/10/2017 12/24/2017 03/23/2018 04/30/2018	09/14/2017 12/27/2017 03/27/2018 03/27/2018	Disbursed Disbursed Disbursed Disbursed	Accepted Accepted Accepted Accepted Accepted	\$2960.00 \$4934.00 \$5920.00 \$6907.00	Disbursement Detail Disbursement Detail Disbursement Detail Disbursement Detail Disbursement Detail

- 27. Select the **COD Info** Tab.
- 28. The COD Info tab displays.
- 29. Review the **COD Info tab** information.

Watson, No Aid Year	el r 2018 201	7-2018 Financial Aid Ye	ear	ID 201251844 Institution WA171	<b>⊘</b> ≌	
F	ell Originati	on ID 664626838CH20	1201251644			
				Personalize   Find   View All	🖉   🔣 🛛 First 🕚 1	-6 of 6 🛞 Last
Disbursement Det	tail COD I	nfo 🚥				
tem Type	Disbt ID	COD Disbt Num	COD Disb Seq	COD Disbt Amount	Enroll School Cod	e
911000000000	01	1	1	987.00		GEPL Detail
91100000000	02	2	1	1973.00		GEPL Detail
911000000000	03	3	1	1974.00		GEPL Detail
911000000000	04	4	1	986.00		GEPL Detail
911000000000	04	4	2			GEPL Detail
	0.4	5	4	1073.00		GEPL Detail

30. The process to review the results of the Create Pell Origination is now complete.31. End of procedure.