


## 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 201251644

Academic Institution = WA171

Aid Year = 2018

Pell Origination ID begins with

Last Name begins with

First Name begins with

[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.

**Pell Origination** | Pell Disbursement | Pell Disb/Career

Watson, Noel ID 201251644

Aid Year 2018 2017-2018 Financial Aid Year Institution WA171

Pell Origination ID 664626838CH201251644 Pell ID Reporting 003793

[Pell Info](#) [Orig Status](#)

☐ Update Pell Origination

Pell Transac Status Ready 04/30/2018 3:10PM

Pell Origination Status Accepted 04/30/2018 3:10PM

Pell MRR Status

Personalize | Find | View All | First 1-2 of 5 Last

Org Detail	Setup Info	Other Information	
Original SSN	Name Code	Attended Pell ID	Action Code
203-14-7362	CH	003793	Accepted
203-14-7362	CH	003793	Accepted

[Save](#) [Return to Search](#) [Notify](#)

[Pell Origination](#) | [Pell Disbursement](#) | [Pell Disb/Career](#)

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

**Pell Information**

Pell Processing Status Reported to ED

Transaction Num

Effective Date

Effective Sequence

Academic Career

Primary Academic Program

Academic Plan

☐ Pell Student Level Override

Low T & F Flag

Academic Calendar

Payment Methodology

Hours/Credits in Acad Year

Weeks in Program Acad Year

Incarcerated Code

☐ Use Fulltime Enrollment ☐ Originate Offered Awards ☐ Originate Max Pell Award

OK Cancel

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

**Pell Origination** | Pell Disbursement | Pell Disb/Career

Watson, Noel ID 201251644  
Aid Year 2018 2017-2018 Financial Aid Year Institution WA171

Pell Origination ID 664626838CH201201251644 Pell ID Reporting 003793

Pell Info Orig Status  
☐ Update Pell Origination

Pell Transac Status Ready 04/30/2018 3:10PM  
Pell Origination Status Accepted 04/30/2018 3:10PM  
Pell MRR Status

Personalize | Find | View All | First 1-2 of 5 Last

Org Detail	Setup Info	Other Information							
Original SSN	Name Code	Attended Pell ID	Action Code	Total Pell	Additional Pell	ED Verification	Status Code	Pell EFC	Sec EFC
203-14-7362	CH	003793	Accepted	\$5920.00	N		N	\$0	
203-14-7362	CH	003793	Accepted	\$5920.00	N		N	\$0	

Save Return to Search Notify

Pell Origination | Pell Disbursement | Pell Disb/Career

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

**PELL ORIG ACTION DETAIL**

Pell Origination ID 664626838CH201201251644 Total Pell Award \$6907.00

**Pell Origination Action Detail** Find | View All First 1 of 1 Last

Seq	Code:	Date	
	Document ID:	User CTC_JMERRILL	<a href="#">Origination Message</a>

[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** | Pell Disbursement | Pell Disb/Career

Watson, Noel ID 201251644  
Aid Year 2018 2017-2018 Financial Aid Year Institution WA171

Pell Origination ID 664626838CH201201251644 Pell ID Reporting 003793

Pell Info Orig Status  
☐ Update Pell Origination

Pell Transac Status Ready 04/30/2018 3:10PM  
Pell Origination Status Accepted 04/30/2018 3:10PM  
Pell MRR Status

Personalize | Find | View All | First 1-2 of 5 Last

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		

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[Pell Origination](#) | [Pell Disbursement](#) | [Pell Disb/Career](#)

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 Disbursement | Pell Disb/Career

Watson, Noel ID 201251644  
Aid Year 2018 2017-2018 Financial Aid Year Institution WA171

Pell Origination ID 664626838CH201201251644 Pell ID Reporting 003793

Pell Info Orig Status  
☐ Update Pell Origination

Pell Transac Status Ready 04/30/2018 3:10PM  
Pell Origination Status Accepted 04/30/2018 3:10PM  
Pell MRR Status

Personalize | Find | View All | First 1-2 of 5 Last

Org Detail	Setup Info	Other Information	Hours Credits Paid	Hours Credits in Acad Yr	Incarcerated Code	Acad Calendar	Ed Flags	Prev ISIR Transac	Prev EFC	Prev Sec EFC Code	Prev COA	ATB
							Ed Flags					ATB
							Ed Flags					ATB

Save Return to Search 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.

Pell Origination | Pell Disbursement | Pell Disb/Career

Watson, Noel ID 201251644  
Aid Year 2018 2017-2018 Financial Aid Year Institution WA171

Pell Origination ID 664626838CH201201251644

Personalize | Find | View All | First 1-6 of 6 Last

Disbursement Detail	COD Info	Item Type	Disbt ID	Pell Disbt Amount	Pell Disbt Date	Pell Actual Disbt Date	Pell Disbt Status	Action Code	Pell YTD Disbt	
		911000000000	01	\$987.00	06/23/2017	07/02/2017	Disbursed	Accepted	\$987.00	Disbursement Detail
		911000000000	02	\$1973.00	09/10/2017	09/14/2017	Disbursed	Accepted	\$2960.00	Disbursement Detail
		911000000000	03	\$1974.00	12/24/2017	12/27/2017	Disbursed	Accepted	\$4934.00	Disbursement Detail
		911000000000	04	\$986.00	03/23/2018	03/27/2018	Disbursed	Accepted	\$5920.00	Disbursement Detail
		911000000000	04	\$-986.00	04/30/2018	03/27/2018	Disbursed	Accepted	\$6907.00	Disbursement Detail
		911000000010	01	\$1973.00	03/23/2018	04/27/2018	Disbursed	Accepted	\$8907.00	Disbursement Detail

Save Return to Search Notify

Pell Origination | Pell Disbursement | Pell Disb/Career

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

[Pell Origination](#)
[Pell Disbursement](#)
[Pell Disb/Career](#)

Watson, Noel

Aid Year 2018 2017-2018 Financial Aid Year

ID 201251644

Institution WA171

Pell Origination ID 664626838CH201201251644

[Personalize](#) | [Find](#) | [View All](#) | |

First

1-6 of 6

Last

Disbursement Detail	COD Info	
Item Type	Disbt ID	COD Disbt Num
911000000000	01	1
911000000000	02	2
911000000000	03	3
911000000000	04	4
911000000000	04	4
911000000010	01	5

Save

Return to Search

Notify

[Pell Origination](#) | [Pell Disbursement](#) | [Pell Disb/Career](#)

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