

9.2 Create Pell Origination Records

Purpose: Use this document as a reference to select students who have been awarded a Pell Grant to be sent to COD for origination using ctcLink.

Audience: Financial Aid Staff.

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.

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

- ZD FA Pell Prcs
- ZD FA Pell Payment 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.

Create Pell Origination Records

Navigation: NavBar > Navigation > Financial Aid > Pell Payment > Originate Pell Payment

1. The Origination search page displays.
2. Enter a New or Existing **Run Control ID**.
3. Select the **Search** button.
4. The Origination page displays.
5. Enter the **Institution**.
6. Enter the **Aid Year** - use the Aid Year in which you are processing.
7. Enter **Pell ID Reporting** (Federal School Code).
8. Leave **Student Override** box unchecked for batch processing.
9. Student Override can be used when processing for individual students.
10. Select the **Run** button.

Origination

Run Control ID PELLORIG Report Manager Process Monitor **Run**

Control Information

*Institution **WA171** *Aid Year **2018** *Pell ID Reporting **003793**

Population Selection

☐ Population Selection

Student Override List Find | View All First 1 of 1 Last

☐ Student Override

Save Notify Add Update/Display

11. The Process Scheduler Request page displays.
12. Select the **OK** button.

Process Scheduler Request

User ID CTC_JMERRILL Run Control ID PELLORIG

Server Name Run Date 01/11/2019 x 24

Recurrence Run Time 11:22:26AM **Reset to Current Date/Time**

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Pell Origination	FAPPLBL0	COBOL SQL	(None)	(None)	Distribution

OK Cancel

14. The Origination page displays.
15. Make note of the **Process Instance** number.
16. Select the **Process Monitor** link.

Origination

Run Control ID PELLORIG

Report Manager **Process Monitor** **Run**

Process Instance:27012834

Control Information

*Institution WA171 *Aid Year 2018 *Pell ID Reporting 003793

Population Selection

☐ Population Selection

Student Override List Find | View All First 1 of 1 Last

☐ Student Override

Save Notify Add Update/Display

17. The Process Monitor page displays.

18. Select the **Refresh** button until Run Status = **Success** and Distribution Status = **Posted**.

19. Select the **Details** link.

Process List Server List

View Process Request For

User ID CTC_JMERF Type Last 1 Days **Refresh**

Server Name Instance From Instance To

Run Status Distribution Status ☒ Save On Refresh

Process List Personalize | Find | View All First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	27012834		COBOL SQL	FAPPLBL0	CTC_JMERRILL	01/11/2019 11:22:26AM PST	Success	Posted	Details

Go back to Pell Origination

Save Notify

Process List | Server List

20. The Process Detail page displays.

21. Select the **Message Log** link.

Process Detail

Process

Instance 27012834

Type COBOL SQL

Name FAPPLBLD

Description Pell Origination

Run Status Success

Distribution Status Posted

Run

Update Process

Run Control ID PELLORIG

Location Server

Server PSUNX

Recurrence

☐ Hold Request
☐ Queue Request
☐ Cancel Request
☒ Delete Request
☐ Re-send Content
 ☐ Restart Request

Date/Time

Actions

Request Created On 01/11/2019 11:23:13AM PST

Run Anytime After 01/11/2019 11:22:26AM PST

Began Process At 01/11/2019 11:23:30AM PST

Ended Process At 01/11/2019 11:23:45AM PST

[Parameters](#)
[Message Log](#)
[Batch Timings](#)
[View Log/Trace](#)

Transfer

OK

Cancel

22. The **Message Log** displays students who have encountered an error.
23. Messages will include but are not limited to:
 - Pell status is either **Transmitted** or **On Hold**
 - Student's Official EFC \$\$\$\$ exceeds the MAX EFC \$\$\$\$ on Pell Payment setup
 - Correction Status is **Sent** or **Send** for student (Referring to ISIR = Unofficial)
24. While many of these students will appear on the **Transaction Status Report**, some will not. Review and work the student list, and re-run **Originate Pell Payment** processes as needed. (Note, if testing this process, running the **Transaction Status Report** is optional -- see steps below).
25. The **Message Log** will also include totals for New and Adjusted Pell Originations.

Message Log

Process

Instance: 27012834 Type: COBOL SQL
Name: FAPPLBL0 Description: Pell Origination

Personalize | Find | View All | | First 1-8 of 8 Last

Severity	Log Time	Message Text	Explain
10	11:23:30AM	FAPPLBL0 : Begin Execution at 11.23.30.250000 on 2019-01-11	Explain
10	11:23:30AM	FAPPLBL0: Pell Origination Beginning for WA171, 2018, 003793	Explain
10	11:23:35AM	FAPPLBL0: Student's Official EFC 12,557 exceeds the MAX EFC 5,328 on Pell Payment setup for: 201248496	Explain
10	11:23:38AM	FAPPLBL0: Pell Origination Ending for WA171, 2018, 003793	Explain
10	11:23:38AM	FAPPLBL0: Total Students with new Pell Origination: 24	Explain
10	11:23:38AM	FAPPLBL0: Total Students with Pell Origination Adjustments: 0	Explain
10	11:23:38AM	FAPPLBL0 : End Execution at 11.23.38.890000 on 2019-01-11	Explain
	11:23:45AM	Successfully posted generated files to the report repository	Explain

[Return](#)

26. The process to create a Pell origination record is now complete.
27. End of procedure.

Run Transaction Status Report

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

- ZD FA Director
- ZD FA Pell Orig Reports
- ZZ FA Pell Orig Reports
- 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.

Navigation: NavBar > Navigator > Financial Aid > Pell Payment > Origination Reports > Transaction Status

i Use the **Transaction Status Report** to see which Originations are "**On Hold**" (will not leave ctcLink due to system errors), or which ones have been set to "**Review**". Perform

the necessary clean-up to the records, and re-run Pell Originations again, and move the data through the steps to outbound to EdConnect*.

*If testing, data will not be imported to EdConnect.

1. The Transaction Status Search Criteria page displays.
2. Enter the desired **Run Control ID**.
3. Select the **Search** or **Add** button.

Pell Records by Trans Stat

Find an Existing Value Add a New Value

Run Control ID WA171_PELL_ORIG_TRANS_STAT_KF

Add

4. The Pell Records by Transac Status search page displays.
5. Enter:
 - **Academic Institution** = i.e., WA171
 - **Aid Year** = i.e., 2018
 - **Pell Transac Status** = i.e., "On Hold", or "Review"
6. Select the **Run** button.

Pell Records by Transac Status

Run Control ID WA171_PELL_ORIG_TRANS_STAT_KF Report Manager Process Monitor Run

Report Request Parameters

*Academic Institution	WA171	Spokane CC
*Aid Year	2018	2017-2018 Financial Aid Year
*Pell Transac Status	On Hold	

Save Notify Add Update/Display

7. The Process Scheduler Request page displays.
8. Select the **OK** button.

Process Scheduler Request

User ID CTC_KFORSBERG Run Control ID WA171_PELL_ORIG_TRANS_STAT_KF

Server Name Run Date 12/16/2020

Recurrence Run Time 10:39:01AM

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Pell Records by Trans Stat	FA882	BI Publisher	Web <input type="button" value="v"/>	PDF <input type="button" value="v"/>	Distribution

9. The Pell Records by Transac Status search page displays.
10. Select the **Process Monitor** link to track the **Run Status** of this report.

Pell Records by Transac Status

Run Control ID WA171_PELL_ORIG_TRANS_STAT_KF Report Manager **Process Monitor**

Process Instance:45871564

Report Request Parameters

*Academic Institution WA171 Spokane CC

*Aid Year 2018 2017-2018 Financial Aid Year

*Pell Transac Status On Hold

11. The Process Monitor page displays.
12. At the **Process List** tab, ensure the job runs to **Success** and **Posted**.
13. Select the **Report Manager** link.

[Process List](#)
[Server List](#)

View Process Request For

User ID

Type

Last

30 Days

Refresh

Server

Name

Instance From

Instance To

Report Manager

Run Status

Distribution Status

☒ Save On Refresh

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	45871564		BI Publisher	FA882	CTC_KFORSBERG	12/16/2020 10:39:01AM PST	Success	Posted	Details

14. At the **Report Manager** page, select the .pdf file link.

[List](#)
[Explorer](#)
[Administration](#)
[Archives](#)

View Reports For

Folder

Instance to

Refresh

Name

Created On

Last

1 Days

Reports

	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	FA882 - Pell Records by Trans Stat.pdf	FA882 - PELL RECORDS BY TRANS STAT.PDF	General	12/16/20 10:40AM	2407834	45871564
2	SCC_COMMGEN	SCC_COMMGEN	General	12/15/20 10:56AM	2407829	45871560

[Go back to Process Monitor](#)

Save

15. The Report page displays.

16. Select the **Pell Records by Trans Status.pdf** link again to open the report.

Report

Report ID 2407834 Process Instance 45871564 [Message Log](#)
Name XMLP Process Type XML Publisher
Run Status Success

FA882 - Pell Records by Trans Stat.pdf

Distribution Details

Distribution Node local Expiration Date 01/15/2021

File List

Name	File Size (bytes)	Datetime Created
Pell Records by Trans Stat.pdf	19,655	12/16/2020 10:40:38.539836AM PST

Distribute To

Distribution ID Type	Distribution ID
User	CTC_KFORSBERG

[Return](#)

17. The Report displays.
18. Review the students on the report.

ORACLE

Report ID: FA882

PeopleSoft

Pell Grant Records

Page No.: 1 of 1
Run Date: 12/16/2020
Run Time: 10:40:26 AM

for Pell Trans Status : On Hold

Institution: WA171 Aid Year: 2018

EMPLID	Name	Origination ID	Pell EFC	Origination Status	MRR Status	AEI
Disbursement ID	RFMS Disb Seq Nbr	Disbursement Amount	YTD Disb Amt	Disb Date	Disbursement Status	Status Date

Total Students :

Total Disbursement Records:

End of FA882 – Pell Grant Records

19. End of procedure.