



**Electronic Access Conference**  
**2000 GET CONNECTED**

**December 12-14, 2000**

**Phoenix, Arizona**



**Student Financial Assistance**

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Through School**



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# Presenters

- **Kathleen Wicks – Acting Director  
Pell Operations  
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- **Karen\_Sefton – Acting Director  
Pell Systems  
Karen\_Sefton@ed.gov**



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# Objectives

- **1999-2000 Year in Review**
  - Funding
  - Close out
  - Just In Time (JIT)
- **RFMS Goals and Achievement**
- **The 2000-2001 Year for RFMS**
- **Lessons Learned**
- **Changes for 2001-2002**
- **A view of the new RFMS on the Web**
- **Questions and Answers**



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# RFMS: 1999-2000 Year in Review

- Served 3.4 million Pell recipients
- Provided nearly \$8 billion for the 1999-2000 award year
- By 5,132 institutions



# What is an Initial Authorization?



- **An initial authorization is:**
  - **A level of funding available to schools for their first Pell recipients.**
  - **Will cover at least 85% of the Pell Grants to be disbursed during your first payment period**
  - **A limited amount that is not intended to fund Pell for the entire award year**





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# Initial Authorization Facts

- **Increased funding to institutions for the award year**
  - **Initial authorization for 1999/2000**
    - **5132 Institutions for \$3,099,602,337.00**
  - **Initial authorization for 2000/2001**
    - **5107 Institutions for \$3,139,737,054.00**



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# REMINDER

- Accepted Disbursements Drive Authorization Levels in GAPS
- No Y2K increase this year



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# Different Types of Funding

Characteristics	Just-In-Time	Advance Funding
Initial Authorization		X
Drawdown from GAPS		X
5 day rule	X	
30 day rule		X
Regulatory Relief	X	





# Advance Funding

<u>Transaction</u>	<u>Obligated Balance</u>	<u>ESOA</u>
▪ Initial funding 50,000.00	50,000.00	Yes
▪ Disbursement accepted 25,000.00	50,000.00	No
▪ Disbursement accepted 75,000.00	100,000.00	Yes



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# What is Just-in-Time Funding?

- **No initial authorization**
- **Disbursement records create a payment**
- **Disbursement date within 5 Days of processing**
- **Funds automatically deposited into school's account**
- **No drawdown from GAPS**
- **Regulatory relief:**



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# Just-In-Time

- **Regulatory relief under Cash Management Regs published 11/29/96**
  - **3-Day-use rule**
  - **Excess-cash rule**
  - **Interest bearing account rule**
  - **Re-verification of eligibility**



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# Just-In-Time Funding

<u>Transaction</u>	<u>Payment</u>	<u>ESOA</u>
▪ Disbursement accepted 25,000.00	25,000.00	Yes
▪ Disbursement accepted 75,000.00	100,000.00	Yes



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# End of the Year



- Dear Partner Letter P-00-2, Sept. 2000
- Regulatory Deadline is September 30
- For 1999-2000, moved to October 2, because of holiday
- Applies to positive disbursements
- Does not apply to negative adjustments
- Does not apply to increases due to POP situations
- Final authorization cannot exceed total accepted student disbursements



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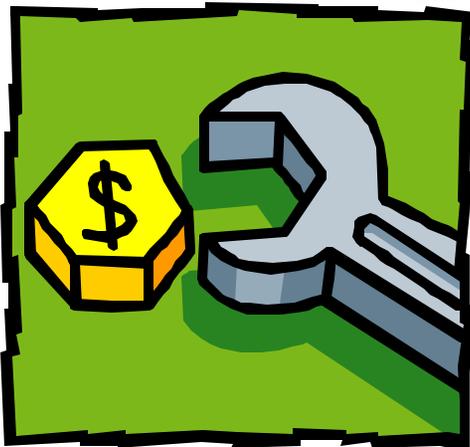
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# Reconciliation

- **Components of reconciliation**
  - **with RFMS/Pell**
  - **with GAPS**
  - **with your internal records**
  - **with your business office**



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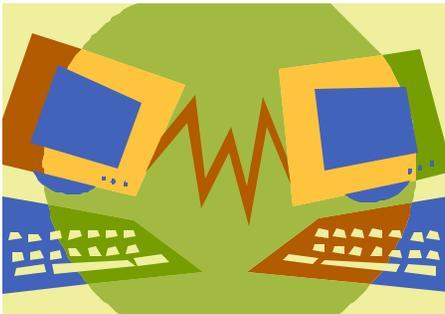
# Tools

- Major reconciliation tools available from RFMS
- Year to Date (YTD) File
  - Request via Web, your Pell software or call Pell Customer Service
- Reconciliation Tool
  - Request via e-mail – [pell\\_systems@ed.gov](mailto:pell_systems@ed.gov)
- Potential Overaward Information (POP) page on the Web
  - Can view any student record
- Disbursement summary on the Web



## Automatic Adjustment to Authorization Levels

- Pending negative disbursements
  - Student disbursed amount greater than award on current origination
  - Warning edit/comment code #323 (Origination is 'Over Paid' and negative disbursement is expected)
- Verification W
  - Origination has student as Without Documentation (W) after deadline
  - Warning edit/comment code #309 (Invalid Verification Code/Correction Applied)



## Automatic Adjustment to Authorization Levels



- Part of annual routine funds control
  - Reduction of authorization levels down to that of the level of accepted disbursement records on file with RFMS
  - Reduction to GAPS level





# Reconciliation – Post Deadline



- **Without Administrative Relief**
  - RFMS/Pell will accept negative disbursements after the deadline
  - Report in batch, tape or on the Web
- **Avoid the audit process**
- **If you've been granted administrative relief**
  - New originations
  - Positive disbursements





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# Administrative Relief

- **What it is**
  - An extension of the period in which schools may submit positive disbursements or upward adjustments
- **When it is granted**
  - When an school has applied for such relief and demonstrated a need based on:
    - Natural disaster
    - System failure
    - Other circumstances beyond the school's control
- **How to apply**
  - See Dear Partner letter posted on IFAP dated September, 2000
  - E-mail address to be established



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# RFMS: Processing Goals



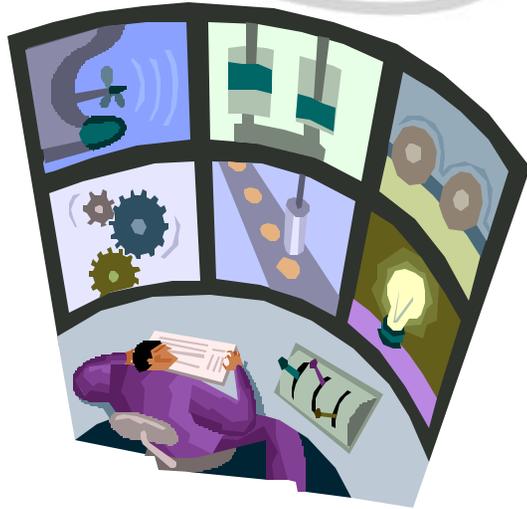
- Acknowledgements for batches and each individual transaction submitted back to schools in an avg. of 3.5 hours
- Acknowledgements for data requests batches back the next day
- Processing of disbursement records through RFMS to GAPS not to exceed 36 hours



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# Achievements

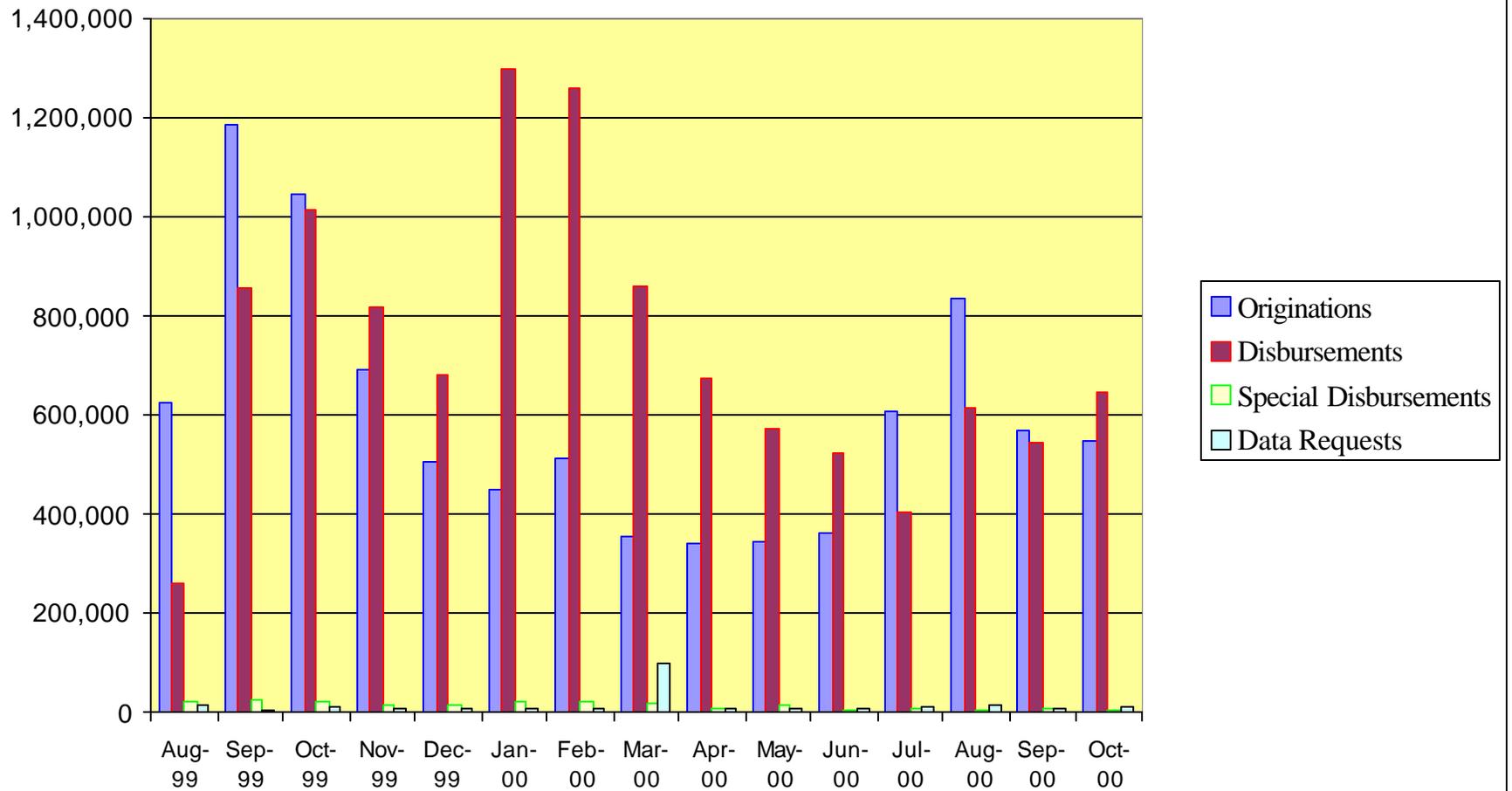
- Acknowledgement placed on TIVWAN in an average of 3.5 - 5 hours
- Earlier notification of potential overaward through the Multiple Reporting Record  fewer POP issues
- Continual reconciliation possible through student level reporting
- Self Service Information and processing through Pell Grant on the Web Product



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# RFMS Statistics

## RFMS Transactions Processed 8/1/99 - 10/20/00





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# Emerging Trends in 2000-2001



- Schools submitting origination records earlier
- Schools submitting disbursement records earlier
- Rate of Rejections of records for September 1999  
– 12.5%
- Rate of Rejections of records for September 2000  
– 10.2%
- Fewer RFMS Corrections to Schools Data
  - Rate of Corrected Records for September 1999  
– 12.4%
  - Rate of Corrected Records for September 2000  
– 9.1%



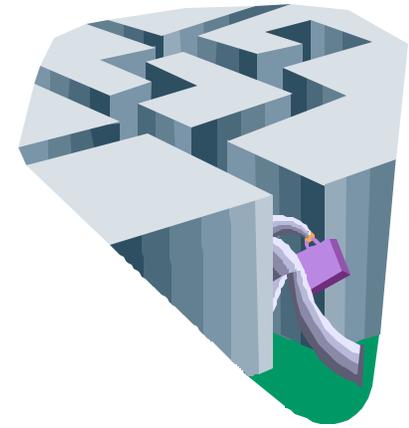
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## Most Commonly Seen Edits in RFMS Processing - September, 2000

- **Edit 302 – Reject**
  - **Duplicate Origination**
  
- **Edit 305 – Correction Applied**
  - **Invalid Award Amount**
  
- **Edit 306 - Correction Applied**
  - **Invalid Disbursement Date**
  
- **Edit 309 – Correction Applied**
  - **Invalid Verification Code**
  
- **Edit 311 – Reject**
  - **Invalid Transaction Number**



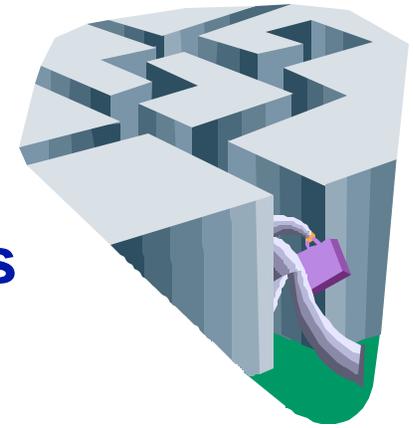
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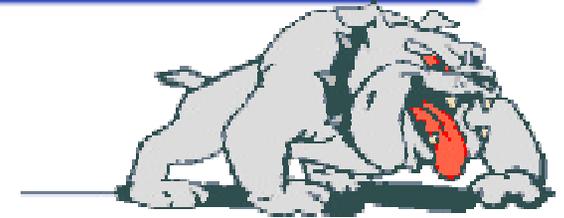
## Most Commonly Seen Edits in RFMS Processing - September, 2000

- **Edit 312 – Reject**
  - **Invalid Expected Family Contribution**
- **Edit 319 - Correction Applied**
  - **Invalid Wks. Of Inst. Time in Programs Definition of Academic Year**
- **Edit 320 – Correction Applied**
  - **Invalid Wks of Inst. time used to calculate payment/award**
- **Edit 402 - Reject**
  - **Origination ID Does not match on RFMS**
- **Edit 403 – Reject**
  - **Disbursement Reference Number Not Valid**



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# Mad Dog



- **What is a Mad Dog?**
  - **RFMS Mad Dog 30- 60 days of fact finding and targeted solutions:**
    - **16 site visits to schools (and a servicer)**
    - **three listening sessions**
    - **call monitoring**
    - **review of e-mail**
    - **3 conferences**





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# Why Mad Dog?



- **Community Feedback was that RFMS was**
  - **Slower**
  - **More work**
  - **Our help, if there was any, wasn't helpful**
- **Findings were categorized into three main areas:**
  - **Easier Use**
  - **Top Notch Service**
  - **Better Information**



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# Changes for 2000-2001

- **System is a rollover for this year - Minimal changes**
- **The Changes**
  - **Cartridge and Reel Not Accepted for 2000-2001**
  - **Batch Replacement no longer a data request option**
  - **YTD can be requested for specific student**
  - **Additional Field to the Special Disbursement Record: Total funds previously disbursed for this Payment Period using a Regular Disbursement Record**
  - **Batch Warning to alert users that they are not using the most current version of EExpress**



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## Changes for 2001-2002

- **Special Disbursement record eliminated**
- **Action Code of 'D' for Duplicate will be generated by RFMS for duplicate records submitted.**
- **If a disbursement amount is corrected down to 0, i.e. POP, then the disbursement record will be Rejected instead of Accepted with corrections.**
- **Number of Payment Periods will no longer be collected on the Origination Record**
- **Adding a user defined Internal Sequence number added to the Origination record**
- **Grant Batch Header - The Grantee DUNS and Financial Servicer DUNS fields are being removed – being replaced with software provider code**



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## Changes for 2001-2002

- **Payment Period Start Date Added to the Disbursement Record**
- **Adding the ability to request the new Reconciliation file**
  - **The Request type will be a 'R'.**
- **More information will included on the MRR record. The following data is being added:**
  - **Student's Name (Last, First, MI), Student's Date of Birth**
- **The Disbursement Batch ID is being added to the Year to Date Disbursement record**
- **YTD - If the Requesting Attended Pell ID is all zeros and the request is a YTD then YTD files will be generated for the Reporting Pell ID and all Attended Pell IDs associated with the Reporting Pell ID**



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# Pell Grant on the Web

- **Unsecure Functions**
  - **View FAA information**
    - **Retrieve demographic information and Contact Information about any institution**
  - **Disbursement Summary**
    - **View the summary of an institution's disbursements in RFMS**
  - **Retrieve Batch Status**
    - **View the status in RFMS of submitted batches**



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# Pell Grant on the Web



- **Secure Functions**
  - **Update FAA Information**
    - **Edit FAA demographic information**
  - **Retrieve Batch Status**
    - **View the detail information of your Origination, Disbursement or Special Disbursement Batches**
  - **Enter Data Request**
    - **Request via the web to receive in your TIVWAN mailbox – SOAs, YTDs, and MRRs**



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# Pell Grant on the Web



- **Secure Functions Cont'd**
  - **POP Information**
    - **View Student Disbursement Information (including percentage used) for any student based on a SSN and Name Code Query**
  - **Change Password**
  - **Post Deadline**
    - Enter Origination, Disbursements, and Special Disbursements if you have been granted Administrative Relief**



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# Pell Grant on the Web

<http://www.pellgrantsonline.ed.gov>

The screenshot shows the homepage of the U.S. Department of Education's Pell Grant web site. The page is titled "Pell Grant on the web Recipient Financial Management System". It features a navigation menu with buttons for "Register", "Contact Us", "FAQ's", "Links", "Help", and "Site Map". A central graphic depicts a laptop, a pen, and a building labeled "ADMINISTRATION". The main text welcomes users and explains the site's purpose for Financial Aid Administrators, school officials, and Servicers. A sidebar on the left contains a "Logon" section with various options like "Update FAA Information" and "Retrieve Batch Details".

October 4, 2000  
11:11:45

U.S. Department of Education

**Pell Grant** *on the web*  
Recipient Financial Management System

Register Contact Us FAQ's Links Help Site Map

Privacy Policy

View FAA Information  
Disbursement Summary  
Retrieve Batch Status

**Logon**

Update FAA Information  
Retrieve Batch Details  
Enter Data Request  
POP Information  
Change Password

**Post Deadline**

Enter Originations  
Enter Disbursements  
Enter Special Disb.

U.S. Department of Education's Federal Pell Grant web site.  
Financial Aid Administrators, other school officials, and Servicers can  
use this web site to access and process Federal Pell Grant data in  
the Recipient Financial Management System (RFMS).

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or 1-800-474-7268.*

Last modified, Tuesday, September 19, 2000

ED HOME



# Pell Grant on the Web



## User Registration

In order to access privacy data on this website, you must have a valid User ID and Password. We use the privacy information to confirm your identity. You previously provided this information on your TIV WAN application form agreement. We will not save or file the privacy information you provide to this website. We use a secure and encrypted connection to exchange all information between the Department and the Financial Aid Community.

Please enter your Pell ID, User ID, Social Security Number, Date of Birth and Mother's Maiden Name.

If you forgot your password, please call the [Federal Pell Grant Hotline](#) at 1-800-4PGRANT or 1-800-474-7268.

Pell ID:	<input type="text"/>	(Institution ID)
User ID:	<input type="text"/>	(TIV Number)
Social Security Number:	<input type="text"/>	(Do not include dashes)
Date of Birth:	<input type="text"/>	(MM/DD/YYYY must include slashes)
Mother's Maiden Name:	<input type="text"/>	

Submit

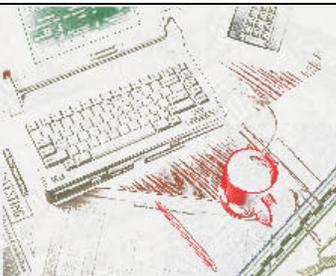
Reset



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# Pell Grant on the Web



## Pell Grant on the web

**RFMS**

### U.S. Department of Education

Recipient Financial Management System Web Site

**Logon**

The privacy information you provide confirms your identity. You previously provided this information on your TIV WAN application form agreement. We will not save or file the privacy information you provide on this website. We use a secure and encrypted connection to exchange all information between the Department and the Financial Community.

If you are a first time user, please [click here](#) to register. Otherwise enter your Pell ID, TG Number and Password to log onto the Federal Pell Grant web site.

**Pell ID:**  (Institution ID)

**TG Number:**

**Password:**



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# Pell Grant on the Web

October 4, 2000  
8:54:6



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[Accounting Balances](#)

[Retrieve Batch Status](#)

#### Logoff

[Update FAA Information](#)

[Retrieve Batch Details](#)

[Enter Data Request](#)

[POP Information](#)

[Change Password](#)

#### Post Deadline

[Enter Originations](#)

[Enter Disbursements](#)

[Enter Special Disb.](#)

U.S. Department of Education

## Pell Grant *on the web* Recipient Financial Management System

[Contact Us](#)

[FAQ's](#)

[Links](#)

[Help](#)

[Site Map](#)



**Welcome to the U.S. Department of Education's Federal Pell Grant web site. Financial Aid Administrators, other school officials, and Servicers can use this web site to access and process Federal Pell Grant data in the Recipient Financial Management System (RFMS).**

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Last modified, Tuesday, September 19, 2000



# Pell Grant on the Web

October 4, 2000  
9:0:43



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[Retrieve Batch Status](#)

**Ligon**

[Update FAA Information](#)

[Retrieve Batch Details](#)

[Enter Data Request](#)

[PDP Information](#)

[Change Password](#)

**Post Deadline**

[Enter Originations](#)

[Enter Disbursements](#)

[Enter Special Disb.](#)



## Disbursement Summary

Select an Award Year from the drop-down menu, then click the "Submit" button.

Click on "Reset" button to clear all fields.

Pell ID:  Award Year: 2000-2001 ▾



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# Pell Grant on the Web

October 4, 2000

9:1:41



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[Retrieve Batch Status](#)

**Logon**

[Update FAA Information](#)

[Retrieve Batch Details](#)

[Enter Data Request](#)

[POP Information](#)

[Change Password](#)

**Post Deadline**

[Enter Originations](#)

[Enter Disbursements](#)

[Enter Special Disb.](#)



## Disbursement Summary

Click the "Back" button to go back to the selection parameter page, or make another selection from the menu at the left.



Data as of: 10/4/2000 8:54:50 AM

Award Year: 2000-2001

Pell ID: 001002      OPEID: 009999      Grantee DUNS: 625116316

School/City/ST: ALABAMA AGRICULTURAL & MECHANICAL UNIVERSITY1  
Normal, AL

Total Positive Disbursement Accepted by RFMS:	\$76,914.83
Total Negative Disbursement Accepted by RFMS:	(\$18,019.32)
Net Total Disbursement Accepted by RFMS:	\$58,895.51
Date of Last Disbursement Accepted by RFMS:	09/09/2000

[Back](#)



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# Pell Grant on the Web

October 4, 2000  
9:21:36



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[Retrieve Batch Status](#)

**Logoff**

[Update FAA Information](#)

[Retrieve Batch Details](#)

[Enter Data Request](#)

[POP Information](#)

[Change Password](#)

**Post Deadline**

[Enter Originations](#)

[Enter Disbursements](#)

[Enter Special Disb.](#)

## POP Information

*This Web Page contains sensitive information protected by the Privacy Act of 1974.  
Privacy Data ... Disclosure Accounting Required.*

Provide the following information to obtain Potential Overaward Project (POP) information for a specific student.

Fill in the student's SSN, Name Code, and select the Award Year from the drop-down menu, then click the "Submit" button.

Click on "Reset" button to clear all fields.

Original SSN:  (Do not include dashes)

Original Name Code:

Award Year:



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# Pell Grant on the Web

October 4, 2000  
9:20:58



Privacy Policy

View FAA Information

Disbursement Summary

Accounting Balances

Retrieve Batch Status

**Logoff**

Update FAA Information

Retrieve Batch Details

Enter Data Request

POP Information

Change Password

**Post Deadline**

Enter Originations

Enter Disbursements

Enter Special Disb.



## POP Information

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Privacy Data ...Disclosure Accounting Required.*

Click the "Back" button to go back to the selection parameter page, or make another selection from the menu at the left.



Print Screen

**Original SSN:** 001010055  
**Original Name Code:** WI  
**Award Year:** 2000-2001

**Student Details:**  
Name: WINDER, FNAME M  
Date of Birth: 01/01/1970  
Total Eligibility Used for all schools (in %): 100.00

**Grant Originations:**

Origination ID/ Institution Name	Reporting Pell ID	Scheduled Amount	Award Amount	Total Disbursed Amount	Eligibility Used (in %)	Process Date
001010055WI200100100200 ALABAMA AGRICULTURAL & MECHANICAL UNIVERSITY1	001002	1,200.00	1,200.00	633.00	052.75	09/09/2000
001010055WI200101528000 AMERICAN COLLEGE OF PUERTO RICO	015280	1,550.00	1,550.00	732.37	047.25	09/09/2000



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# Pell Grant on the Web

November 7, 2000  
9:56:34



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[Disbursement Summary](#)

[Accounting Balances](#)

[Retrieve Batch Status](#)

**Logoff**

[Update FAA Information](#)

[Retrieve Batch Details](#)

[Enter Data Request](#)

[POP Information](#)

[Change Password](#)

**Post Deadline**

[Enter Originations](#)

[Enter Disbursements](#)

[Enter Special Disb.](#)



## Enter Originations Output Type

You may utilize this page to make changes to an existing Origination record that do not result in an increase in the award amount.

To enter a new Origination or make a change to an existing Origination that results in an increase in the award amount, an institution must be granted Administrative Relief or Audit Adjustment.

For further information on Administrative Relief or Audit Adjustment, please contact Customer Service at 1-800-474-7268 or see the Post Deadline Processing letter via [Dear Partner \(Colleague\) Letter](#) on IFAP Web site.

If you are an EDExpress user, [click here](#).

Please select your desired output type: Origination Acknowledgement or Year to Date. Click on "Reset" button to clear all fields.

Award Year: **1999-2000**

### Output Type:

- Origination Acknowledgement
- Year to Date

EDExpress user must choose the Year to Date option.

[Next](#)

[Reset](#)



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# Pell Grant on The Web



## EExpress Schools

Once you download your PGYR00OP.\* files(s) from the Title IV Wan, Start 1999-2000 EExpress and perform the following steps for (delete) for each import file:

1. Go to File | Import | Pell and choose YTD Data for the Import Type;
2. Click on the Import From ellipsis button and select one of the PGY00OP.\* files you received in response to your web submission;
3. Under Update, Click on the down arrow and choose Selected, then Click OK;
4. You will be presented with a grid displaying a single Origination record.  
Verify that (add) the Origination ID displayed belongs to the student you submitted via the web. Click in the Select box next to the Origination Id to select the student record for update, then click OK;
5. Click on Yes for the prompt "Are you sure you want to update selected records?";
6. A progress bar will appear indicating the record is being updated/created. When the progress bar completes you will be presented with a "progress complete" message. Click OK. When this message disappears an exception report will be generated. Click on CANCEL once this is complete.

Repeat the above steps for each PGYR00OP.\* file generated via a Post-Deadline web submission.

[Click the Exit button to go back to previous page.](#)

Exit



Privacy Policy

- View FPA Information
- Disbursement Summary
- Accounting Balances
- Retrieve Batch Status

- Logoff
- Update FPA Information
- Retrieve Batch Status
- Enter Data Request
- POP Information
- Change Password
- Post Deadline
  - Enter Originations
  - Enter Disbursements
  - Enter Special Disb.



## Enter Originations

*This Web Page contains sensitive information protected by the Privacy Act of 1974. Privacy Data ... Disclosure Accounting Required.*

Complete the following information to Originate a student in the RFMS.

The fields marked with an \* are required entries.

Complete the information for the remaining fields as indicated.



**Reporting (Main)**

**Campus Pell ID:**  \*

**Attending Campus Pell ID:**  \*

**Award Year:** 1999-2000

**Student Name:**

**Original SSN:**  \* (Do not include dashes)

**Name Code:**

**Institution Cross Reference:**

**Number Payment Periods:**

**Award Amount:**   \* (Do not include the \$ sign)

**Enrollment Date:**  \* (Do not include dashes/slashes. Format should be CCYYMMDD)

**Low Tuition & Fees Code:**

**Verification Status Code:**

**Incarcerated Pell Code:**

**Transaction Number:**  \*

**Payment Methodology:**  \*

**Cost of Attendance:**   \* (Do not include the \$ sign)

**Enrollment Status:**  (Required for PM 1,2,3,5)

**Weeks of Instruct Time:**  (Required for PM 2,3,4,5)

**Weeks in Acad Year:**  (Required for PM 2,3,4,5)

**Hours to Complete:**  (Required for PM 4,5)

**Hours in Acad Year:**  (Required for PM 4,5)

**First Disbursement Date:**  \* (Do not include dashes/slashes. Format should be CCYYMMDD)

Click on "Save" to add this transaction and enter another transaction. Click on "Submit" to complete the entry process, and submit the batch to the Pell RFMS. Click on "Reset" to clear all the fields.

# Pell Grant on The Web



# Pell Grant on The Web

November 7, 2000  
9:58:16



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## Enter Disbursements Output Type

You may utilize this page to enter negative Disbursements. RFMS always accepts negative Disbursement transactions. To submit a negative Disbursement transaction, click on the "Next" button to proceed to the "Enter Disbursements" page.

Positive Disbursement transactions will be accepted by RFMS only for schools that have been granted Administrative Relief or Audit Adjustment, or for a student that was previously in a POP situation prior to the deadline and has been subsequently unblocked.

For further information on Administrative Relief or Audit Adjustment, please contact Customer Service at 1-800-474-7268 or see the Post Deadline Processing letter via [Dear Partner \(Colleague\) Letter](#) on IFAP Web site.

If you are an EDEExpress user, [click here](#).

Please select your desired output type: Disbursement Acknowledgement or Year to Date. Click on "Reset" button to clear all fields.

Award Year: **1999-2000**

### Output Type:

- Disbursement Acknowledgement  
 Year to Date

EDEExpress user must choose the Year to Date option.



*If you experience any problems with the information presented on this page, please contact the Federal Pell Grant Hotline at 1-800-4PGRANT or 1-800-474-7268.*

October 10, 2000  
16:32:34



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Enter Disbursements

Enter Special Disb.



## Enter Disbursements

*This Web Page contains sensitive information protected by the Privacy Act of 1974.  
Privacy Data ... Disclosure Accounting Required.*

Complete the following information to Request Data from the RFMS.

The fields marked with an \* are required entries.

Complete the information for the remaining fields as indicated.



<b>Reporting (Main)</b>	
<b>Campus Pell ID:</b>	<input type="text"/> *
<b>Attending Campus Pell ID:</b>	<input type="text"/> *
Award Year:	1999-2000
Student Name:	<input type="text"/>
Original SSN:	<input type="text"/> * <small>(Do not include dashes)</small>
Name Code:	<input type="text"/>
Institution Cross Reference:	<input type="text"/>
Disbursement Reference Number:	<input type="text"/> *
Debit/Credit Indicator:	Positive ▾*
Disbursement Amount:	<input type="text"/> <input type="text"/> * <small>(Do not include the \$ sign)</small>
Disbursement Date:	<input type="text"/> * <small>(Do not include dashes/slashes. Format should be CCYYMMDD)</small>
<hr/>	
Click on "Save" to add this transaction and enter another transaction. Click on "Submit" to complete the entry process, and submit the batch to the Pell RFMS. Click on "Reset" to clear all the fields.	
<input type="button" value="Save"/> <input type="button" value="Reset"/> <input type="button" value="Submit"/>	



# Pell Grant on The Web



Electronic Access Conference  
2000 GET CONNECTED

# Contacts and Resources

- Pell Customer Service Center – 1- 800-4PGRANT (800-474-7268)
- E-mail – [pell\\_systems@ed.gov](mailto:pell_systems@ed.gov)
- Web – <http://www.pellgrantsonline.ed.gov>
- Policy/General - 1-800-4FEDAID (800-433-3243)
- CPS – 1-800-330-5947
- GAPS – 1-888-336-8930
- IFAP – <http://ifap.ed.gov>



We Help Put America  
Through School

# Questions and Answers

