Creating an account

Financial Aid Office access:

- Email PartnerPortalSupport@hecc.oregon.gov or complete our email contact form on our website
  - Request needs to come from supervisor of employee needing access
  - Include the new hire’s (or existing OSAC user):
    - Name
    - Email
    - Title
    - Contact phone number
    - Which OSAC programs to access
    - School name
    - School code
Creating an account

- When OSAC sets up a new account, we will send instructions to the new user on how to log in for the first time.
  - For existing users, we will send a confirmation email that the account has been updated.
- Locked out or forgot your password?
  - Email PartnerPortalSupport@hecc.oregon.gov
  - Yearly account reset
Logging in

- URL: [https://partners.oregonstudentaid.gov/](https://partners.oregonstudentaid.gov/)
The Dashboard is the “Home” link to return to the main partner portal screen where you can access OSAC program data.
High School Partner Portal

High Schools

McKay High School
- FAFSA Plus+ Program
- OSAC Scholarship Application
- Oregon Promise Grant
- Grades Calendar
- Folder
### ABC University
- Opportunity Grant
- Chafee Education & Training Grant (ETG)
- Foster Tuition Waivers
- Scholarship Awards
  - All or by criteria
  - Roster
- ORSAA Fafsa Download
- National Guard
- Oregon Tribal Student Grant (OTSG)
- Folder

### Chemeketa Community College
- Opportunity Grant
- Oregon Promise
- Chafee Education & Training Grant (ETG)
- Foster Tuition Waivers
- Scholarship Awards
  - All or by criteria
  - Roster
- Oregon Financial Aid Exchange (OFAX)
- ORSAA Fafsa Download
- Oregon Tribal Student Grant (OTSG)
Opportunity Grant

Oregon Opportunity Grant Feature Index
ABC University (000000)

On-Demand OOG Award Calculations (with data filters and Export to Excel option)
- Authorized Awards - All or by batch (and export to Excel)
- List History - by List Date, Change Status and/or Student (and export to Excel)
- Late Filers with Estimated Awards - by List Date, Change Status and/or Student (and export to Excel)
- People with Varied Histories

Request for Record Adjustments
- Reload and Lock FAFSA Transactions after Packaging

Disbursement Reporting
- Disbursement Reporting System

Documentation
- Oregon Opportunity Grant Program Policies and Procedures, 2021 (PDF file)
- Fall Enrollment Waiver Request (PDF file)
- Award File Layout & Descriptions
- Help
- Instructions for using the Reload-and-Lock Function for FAFSA transactions (PDF file)
Opportunity Grant

Authorized Awards - All or by batch

ABC University (000000)

This screen can be used to access up-to-date calculations prior to the first list and in-between the weekly Grant Lists.

The data will be refreshed as of the previous FAFSA day’s download.

Displays the table of authorized and disbursed amounts for each student in each term in academic year.

If you need to upload a new set of SSNs please use this form:

File must be a one column text file with SSNs only. The SSNs will be matched up with our data and displayed below.

<table>
<thead>
<tr>
<th>Batch File Year</th>
<th>Batch File</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23</td>
<td>Choose File No file chosen</td>
</tr>
</tbody>
</table>

Upload File and Display

- Click “Display Results” button to query and view the data.
- Click on any column header to sort the grid by that column. Toggle ascending/descending.
- Click “Export List to Excel” button to write the list to Excel (works with Internet Explorer browser).

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>SSN</th>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Query Selection Choice

- Complete List of Students
- By Batch List of SSNs
- By Search Criterion

Display Results Results to Excel

Click for List History Last Name First Name MI Ac Year Trm # EFC AGI Rmm Elig Terms Trm1 Auth Trm2 Auth Trm3 Auth FT Full Year Amt HT Full Year Amt Total Dab
Opportunity Grant

- Authorized Awards screen:
  - Uploading SSN’s for OOG (if there is a SSN mis-match)

If you need to upload a new set of SSNs please use this form:

File must be a one column text file with SSNs only. The SSNs will be matched up with our data and displayed below.

<table>
<thead>
<tr>
<th>Batch File Year</th>
<th>Batch File</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23</td>
<td>Choose File</td>
</tr>
</tbody>
</table>
Opportunity Grant

- **Authorized Awards Screen:**
  - Search for OOG eligible students, look up a student’s remaining need, or download an updated OOG list

  ![Authorized Awards Screen](image-url)
Opportunity Grant

- List History Screen:

**OOG Grant List History**

ABC University (000000) for Academic Year 2022-23

This screen displays the Grant List History for the year, list date, change status, or student selected.

- Click 'Display Results' button to query and view the data.
- Click on any column header to sort the grid by that column. Toggle ascending/descending.
- Click 'Export List to Excel' button to write the list to Excel (works with Internet Explorer browser).

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>List Date</th>
<th>Change Status</th>
<th>Reason Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23</td>
<td>01/16/2023</td>
<td>- Not Selected-</td>
<td>- Not Selected-</td>
</tr>
</tbody>
</table>

- SSN
- Last Name
- First Name
- OSAC/Person Id

[Display using Filters] [Export List to Excel]
Opportunity Grant

- OOG Late Filers with Estimated Awards screen

### OOG Late Filers with Estimated Awards

ABC University (000000) for Academic Year 2022-23

This screen displays the Grant List data for all students who filed their FAFSA after the cut-off date and would have been eligible otherwise.

- Click 'Display Results' button to query and view the data
- Click on any column header to sort the grid by that column. Toggle ascending/descending
- Click 'Export List to Excel' button to write the list to Excel (works with Internet Explorer browser)

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>List Date</th>
<th>Change Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23</td>
<td>01/16/2023</td>
<td>- Not Selected -</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SSN</th>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Display using Filters] [Export List to Excel]
Opportunity Grant

Oregon Opportunity Grant Reload and Lock FAFSA Transaction Request

ABC University (000000)

With this process you may request to reload and lock a specific FAFSA transaction either by providing the student’s SSN and transaction number in the text boxes below or by uploading a tab delimited txt file that contains SSNs and the FAFSA Transaction Number (TrnNbr) you are basing your packaging on. The file must have two columns, SSN and TrnNbr, and the TrnNbr must be a two digit text field, where TrnNbr 1 is represented as ‘01’.

FAFSA transactions are school specific, so locks are also school specific. It is possible for OOG award amounts to vary for a student from one institution to another. Once a school has locked a student’s FAFSA transaction, all subsequent FAFSA transactions for that student will not be processed for awards at that specific school. To undo a locked record or lock a different FAFSA transaction, the school must initiate a new “Reload and Lock” process.

We reserve the right to deny any request.

Before you upload the file, check for the following:

- Make sure that the file is a tab delimited text file named with a “txt” extension (e.g., ssn.txt).
- Make sure that the file has two columns, SSN and TrnNbr, and is a tab delimited txt file.
- SSNs with leading zeros will still update if the leading zero is stripped when saved to a txt format file.
- Make sure that the file that you are uploading is not open in a text editor.
- Make sure that the file does not have a heading row. If it does, delete the heading row.
- Make sure that the file does not have any blank spaces at the end of any row, or any blank lines at the bottom of the file.

<table>
<thead>
<tr>
<th>Single Request Academic Year</th>
<th>Social Security Number</th>
<th>Transaction Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Submit Single Lock Request

<table>
<thead>
<tr>
<th>Bulk Request Academic Year</th>
<th>UploadFile</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23</td>
<td>Choose File: No file chosen</td>
</tr>
</tbody>
</table>

Submit Bulk Request
Opportunity Grant

Oregon Opportunity Disbursement Processing Menu
Chemeketa Community College (003218) for Academic Year 2022-23

Disbursement Reporting

- Upload File for Disbursement Reporting

Or

- Check-off Disbursed Students

Disbursement Reporting Finalization

Final step. Notifies OSAC when your reporting is complete

- Complete Disbursement Reporting

Disbursement Reporting Tools

Tools to review, compare, add or edit disbursement information:

- Display Table of Disbursements (Add/Edit)
- Upload File for Record Comparison
OSAC Grants Disbursement Reporting Schedule 2023-24

This schedule is used for Oregon Opportunity Grant, Oregon Promise Grant, and Oregon Tribal Student Grant.

<table>
<thead>
<tr>
<th>Semester/Quarter</th>
<th>Week Term Begins</th>
<th>Reporting Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall semester</td>
<td>8/28/2023</td>
<td>11/6/2023 - 11/22/2023 (2.5 weeks)</td>
</tr>
<tr>
<td>Fall quarter</td>
<td>9/25/2023</td>
<td>11/6/2023 - 11/22/2023 (2.5 weeks)</td>
</tr>
<tr>
<td>Winter quarter</td>
<td>1/8/2024</td>
<td>2/12/2024 - 2/23/2024 (2 weeks)</td>
</tr>
<tr>
<td>Spring quarter</td>
<td>4/1/2024</td>
<td>5/6/2024 - 5/17/2024 (2 weeks)</td>
</tr>
<tr>
<td>Year-end reconciliation</td>
<td></td>
<td>6/10/2024 - 6/21/2024 (2 weeks)</td>
</tr>
</tbody>
</table>

In general, reporting periods are scheduled as close as possible to the final withdrawal date for each academic term. Disbursement deadlines for each academic term are the final day of each reporting period. Any disbursements colleges want to make after a disbursement deadline must be first approved by the Oregon Opportunity Grant Administrator. Submit those requests ASAP to PublicPrograms@hecc.oregon.gov. OSAC will make every effort to notify institutions of changes in the reporting schedule as soon as possible to ensure timely reporting of data.
Opportunity Grant

Documentation

- Oregon Opportunity Grant Program Policies and Procedures, 2021 (PDF file)
- Fall Enrollment Waiver Request (PDF file)
- Award File Layout & Descriptions
- Help
- Instructions for using the Reload-and-Lock Function for FAFSA transactions (PDF file)
Opportunity Grant

- Two primary factors to determine eligibility
  - FAFSA/ORSAA filing cutoff
  - Financial Need (EFC/SAI) limit

- Fall is typically required to receive aid for any part of the academic year. However, OSAC sometimes is able to waive the Fall enrollment requirement based on funding. 2023-24 does not have a fall enrollment requirement.
  - This has not yet been determined for 2024-25 school year.

- Students must be enrolled at least 6 credits:
  - 6-11 credits: HT award
  - 12+ credits: FT award
# Opportunity Grant

## OOG Grant List History

This screen displays the Grant List History for the year, list date, change status, or student selected.

- Click 'Display Results' button to query and view the data.
- Click on any column header to sort the grid by that column. Toggle ascending/descending.
- Click 'Export List to Excel' button to write the list to Excel (works with Internet Explorer browser).

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>List Date</th>
<th>Change Status</th>
<th>Reason Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023-24</td>
<td>12/25/2023</td>
<td>Not Selected</td>
<td>- Not Selected -</td>
</tr>
</tbody>
</table>

**Reason Code**

- A - Not accepted
- B - Copy added after block
- C - Not eligible based on SRM calculation - possible high EFC?
- D - FAPSA received after award cut-off date
- E - FAPSA above current Max Allowed EFC cut-off
- G - Graduate student
- H - OSAC hold on application
- I - Ineligible based on income
- L - Less than FT aid remaining, or low remaining eligible and previous years not completed
- N - Non-resident
- O - Rejected ORSAA
- P - Fell ineligible (only for grandfathered awards)
- S - Stop award
- T - Does not qualify for Tuition Equity
- X - Expired eligibility
- Z - Non-citizen
Oregon Promise Reported Students

Chemeeketa Community College (003218)

To review specifications and terms for this page and file downloads, please go to the Student Disbursement Status File Layout page.

For purposes of communication, please do NOT send SSNs. Instead, please reference the PeopleID or your School’s Student Id.

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student Id</th>
<th>Last Name</th>
<th>First Name</th>
<th>Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Is Matched?
- Is Authorized
- Is Correct Amount?
- Is Tolerable Amount?
- Is Disbursement Selected?

Search | Clear | Export List to Excel

<table>
<thead>
<tr>
<th>Student Id</th>
<th>Name</th>
<th>Matched</th>
<th>Total Credits Attempted</th>
<th>Total Dollars Disbursed</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>True</td>
<td>14.00</td>
<td>657</td>
<td>Chemeketa Community College, Fall Quarter, 667, 14.00, 0.00, Selected, Authorized, Correct Amount, Tolerable Amount (Delta: 0)</td>
</tr>
</tbody>
</table>

1 2 3 4 5 6 7 8 9 10 ... 34 (1687 results)
Chafee Education & Training Grant (ETG) - Eligible Student List

ABC University (000000)

The students eligible for the Chafee ETG award who have listed your school as their primary choice are in the list below. The OSAC Authorized Award Amount (up to $5,000.00) is fixed for 2022-23. See the instructions for updating the list.

Click 'Display Results' button to refresh the data using the Academic Year and Award Status filters. Click 'Export to Excel' button to write the list to Excel (works with Internet Explorer browser).

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Award Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Years</td>
<td>- All codes -</td>
</tr>
</tbody>
</table>

- All codes:
  - Authorized (SELECT)
  - Awarded (AVD)
  - Declined award (XDECLINE)
  - Disqualified: Changed GPA does not meet limits (XCHG_GPA)
  - Disqualified: Lack of Satisfactory Academic Progress (XNO_SAP)
  - Disqualified: No need (XNONEED)
  - Disqualified: Not attending (XCHGNOATT)
  - ON HOLD: Fin Aop Complete but Review Pending (HFAO_RVW)
  - ON HOLD: Financial Aid Applications Incomplete (HFAO_INC)
Foster Tuition Waivers

- To find eligible students, first click search
- List is provided for and updated by DHS
- If you are looking for a student not listed, email PublicPrograms@hecc.oregon.gov

![Foster Tuition Waivers Form]

ABC University (000000) for Academic Year 2023-24

<table>
<thead>
<tr>
<th>Last or First or SSN</th>
<th>AppYear</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2022-23</td>
</tr>
</tbody>
</table>

Search

Instructions/Upload

No foster students matched your search.
Scholarship Awards

- Scholarship Awards
  - Lists potential awardees
  - Also has change statuses like OOG

- Scholarship Disbursements
  - Can look up funds by batch # or by date
  - Confirm with your accounting dept. of funds were received before disbursing
## Scholarship Awards

### Scholarship List History

**ABC University (000000) for Academic Year 2022-23**

**ATTENTION FINANCIAL AID OFFICE STAFF:** The details below identify pending scholarship awardees for the academic year selected. Students appear in the list based on the information they have most recently provided to OSAC.

Students are also notified of these awards by mailing our office. To receive funds, students must return a signed award notification, at which time they confirm their college choice. This preliminary list is intended only to alert financial aid staff of a potential award. Final confirmation to you takes place with OSAC's disbursement of funds. You cannot assume that funds will automatically arrive for every award identified in this file. Do not disburse funds to students until you receive funds from OSAC.

The scholarship awardees for the 2022-23 academic year are now available. At this time, no new lists for 2021-22 scholarship awardees will be generated. If you have any questions, please contact your office.

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>List Date</th>
<th>Change Status</th>
<th>Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23</td>
<td>1/30/2023</td>
<td>- Not Selected -</td>
<td>- Not Selected -</td>
</tr>
</tbody>
</table>

### Scholarship Disbursement Roster

This page displays the table of disbursed scholarship awards for the date range specified for each student in each term in academic year.

**Batch Date After**

<table>
<thead>
<tr>
<th>Batch Date After</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/01/2022</td>
</tr>
</tbody>
</table>

**Batch Date Before**

<table>
<thead>
<tr>
<th>Batch Date Before</th>
</tr>
</thead>
<tbody>
<tr>
<td>mm/dd/yyyy</td>
</tr>
</tbody>
</table>

**Batch #**

<table>
<thead>
<tr>
<th>Batch #</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSN</td>
</tr>
</tbody>
</table>
The Oregon Financial Aid Exchange (OFAX) is a service set up by OSAC to facilitate the exchange of financial aid-related data about co-enrolled students between the Oregon schools in which the students are co-enrolled.

OFAX provides a website that financial aid offices can use to upload a file of their data for co-enrolled students and download a merged file with added data on these students from the participating co-enrolled schools.

The school uploading a file is, essentially, sharing its data with any school that needs it and establishing the population for which they want to receive co-enrollment data from the other schools.
OFAX Upload Data
Chemekeata Community College (003218)

1. Step 1: Select the document to upload:
   Select file
   UploadFile

2. Step 2: Click on the 'Upload File' button

**NOTE:** you will be allowed to choose your download option on the "Reprocess" screen after successful upload

**Important!**
- Click on the button by the Select file text box (named 'Browse' or 'Choose', depending on your browser), which opens a dialog box where you can specify the file stored on your computer. Then click on the 'Upload File' button.
- If you get an error message when uploading your file:
  - If it is a formatting issue, review the format error message and please reformat your file. Make sure that your file conforms to the File Data Layout. Generally, only the first error in the file is displayed.
  - Make sure that you do not have the file that you are uploading open in a text editor.
  - Make sure that your file is a comma-separated values text file, named with the "csv" file extension (e.g., OFAXData.csv)
  - Make sure that your file is plain text (no binary characters)
  - If you have transferred your file using FTP, you have to use transfer mode ASCII (not binary).
- If you still have problems uploading a file, fill out an [feedback form](#).
ORSAA Download

Just like FAFSA, this is a list of every student who listed your school in their ORSAA.
National Guard

- Schools check for eligible students and report on the student’s school eligibility factors
  - SAP, Earned 4-yr Deg, Declared Major, and prior credits
  - OSAC calculates estimates for credits, tuition, aid, and ONGSTA award
    - Schools report:
      - actual data for OSAC estimated fields
      - Completed credits
      - Tuition at end of term
      - Awarded ONGSTA at the end of term
Oregon Tribal Student Grant

- Reporting dates align with OOG
- Fill in all columns
- Please add in any/all notes at the end
- Click save often at the top left
- OTSG is a last-dollar program:
  - Grant payments for eligible recipients are disbursed on a term/semester basis provided that SAP is met and student is in a degree seeking program/certificate. Award amounts will be pro-rated for half time and three-quarter time enrollment levels.
Folder

• If you need to share a large file of student data (or something in general with OSAC that contains PII), please use the Folder to upload files and email the appropriate staff.

• In general, please do not email ANY SSN info or full DOB. OSAC staff can typically find students based on full name only (if common name, you can include year of birth)
Need help?

- Contact/feedback button
Thank you!

Jennifer.Bruce@hecc.oregon.gov
Anel.Venegas-Trujillo@hecc.oregon.gov