



Financial Aid: HEI Proficiency Award File

A Tutorial for:

File creation

File submission

File query

Adapted from the presentation given at the HEI Users Conference on March 24, 2000
at the Central Ohio Technical College



URLs to bookmark

Ohio Board of Regents Home Page

<http://www.regents.state.oh.us>

HEI Home Page

<http://www.regents.state.oh.us/hei/index.html>

HEI Data Input Site

<https://hei.regents.state.oh.us/cgi/heigui>

PA Data Entry Page

https://hei.regents.state.oh.us/cgi/pa_data_entry_form

PA Query

[https://hei.regents.state.oh.us/cgi/HEInet.cgi?\\$sp_html_hei_pa_query%20%2713.0%27](https://hei.regents.state.oh.us/cgi/HEInet.cgi?$sp_html_hei_pa_query%20%2713.0%27)

OIG Rosters

<https://hei.regents.state.oh.us/cgi/oigrostr.pl>

Liaisons Only (account administration)

[https://hei.regents.state.oh.us/cgi/HEInet.cgi?\\$sp_html_hei_login%20%271%27](https://hei.regents.state.oh.us/cgi/HEInet.cgi?$sp_html_hei_login%20%271%27)

➤ Logging in

You must use Netscape 4.1 or higher in order for the HEI screens and encryption (security features) to work properly. It can be downloaded at no charge at <http://home.netscape.com/download>

You will first be prompted to provide your User Name and Password any time you have navigated to a page with restricted access. You must use your own account since any automated correspondence, such as edit results and payment notification, will be sent via e-mail to the address attached to the account used for each transaction.



Fig. 1

All administrators with an HEI account should have completed and returned the Campus User Authorization Form. It can be downloaded at <http://www.regents.state.oh.us/hei/form.PDF>



- Creating a file through the PA Data Entry Page https://hei.regents.state.oh.us/cgi/pa_data_entry_form

The screenshot shows a web-based form titled "Create/Change Pending Records". At the top, there is a "Rec #:" label and a "View Last 10 Records Successfully Saved to Data File" button. Below this, the form contains several input fields: "Student Identifier", "Last Assigned Switch" (with a dropdown menu showing 'N'), "First Name", "Middle Initial", "Last Name", "Voucher ID Number", and "School ID Number". There are also "Year/Term Enrolled" (with a dropdown menu showing '2000AM') and "Delete Switch" (with a dropdown menu showing 'N') fields. At the bottom of the form, there are three buttons: "Add/Change Record", "Remove Record", and "Clear Records". Below the form, there is a section titled "Pending Records" with a "Rec #:" label and a large empty table area. At the bottom of the page, there are three buttons: "Clear Records", "Save Records to Data File", and "Submit Data File to Edit".

Fig. 2

The PA Data Entry Page provides a screen in which you can key records from the Proficiency Tests Scholarship vouchers and save them to a file that is formatted for submission to HEI. The screen applies edits to each field as you enter the information. It also creates a proper header record for the file.

There are three steps to using the PA Data Entry Page:

- 1) Add Record - Select this after keying all the necessary fields for an individual record. It appends the individual record to the other records in the file.
- 2) Save Records to Data File - Select this after you have entered all of the records. This allows you to save your work to either return later to edit, add or submit to HEI.
- 3) Submit Data File to Edit - Select this to perform system edits against all the records in your file. These edits include searching the HEI system for duplicates. Once you have edited a file, you cannot change it. Any additions or corrections must be submitted in a subsequent file. Note: The editing process is all or nothing with a file. All fields for all records in a file must pass the edits in order for HEI to process it.

➤ Submitting records through the HEI Data Input Site

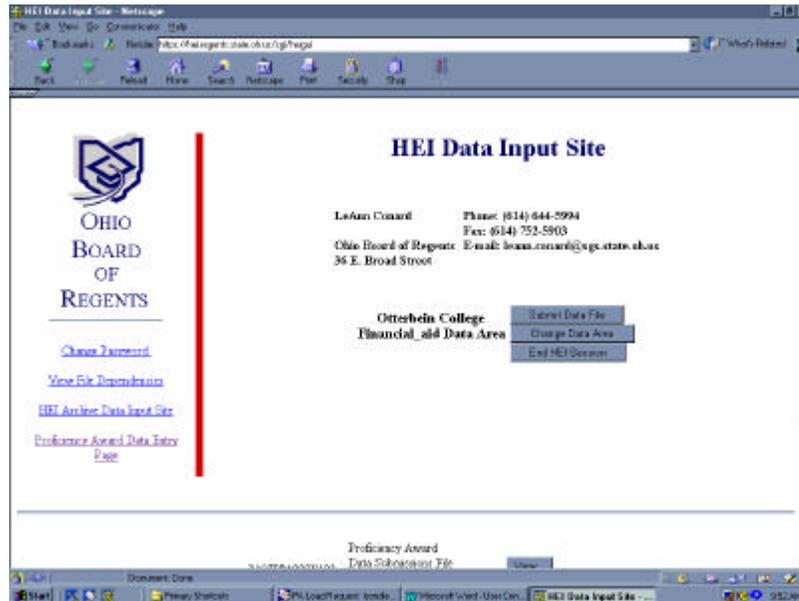


Fig. 3

The Submit Data File option is for files you have created separately from the Data Entry Page, using your own software such as Excel. Files created through the Data Entry Page have already been submitted for editing as described above.



Fig. 4

You must know where you have saved your file and it must be in a location that can be accessed through your PC. Select Browse in order to tell Netscape the location and file name that you are submitting. Then select Submit File.

The file format and description can be viewed at www.regents.state.oh.us/hei/datasubdoc/finaid/pafile.html

Note: The editing process is all or nothing with a file. All fields for all records in a file must pass the edits in order for HEI to process it.

The file format and description can be viewed at www.regents.state.oh.us/hei/datasubdoc/finaid/pafile.html



➤ Request Load files from the Data Input Site

After you have created, saved and submitted a file for editing, you must still complete one more step - Request Load. This is the final confirmation that you give to request that HEI merges the new records and overwrites the replacement records in the HEI system.

Select Request Load next to each file that you wish to have loaded into the HEI system.

The files that you select are then reviewed by an HEI analyst and then approved for loading. This is performed midday and evening after the analyst's review

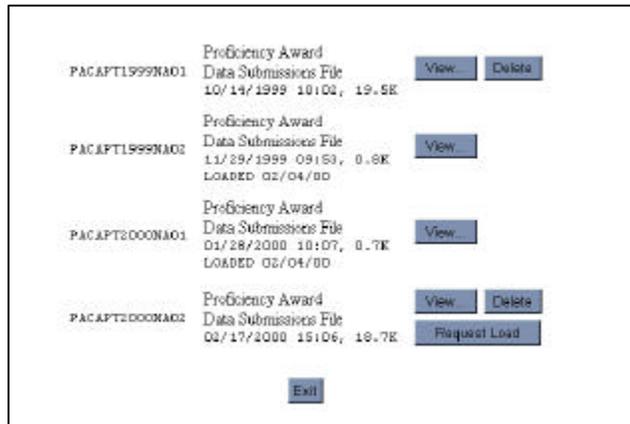


Fig. 5



➤ Viewing Activity on the Data Input Site

The files for the data area appear in the order of the file name. This name is assigned by HEI and is based upon:

- File type - the two character code assigned to the type of records contained in the file
- Institution code
- Year
- Term
- Sequential number

The list of files includes those submitted through Data Entry Page and those created independently and submitted through the Data Input Site.

In some cases, the number of files will exceed the space allowed on your screen. You may need to scroll down to view the more recent files.

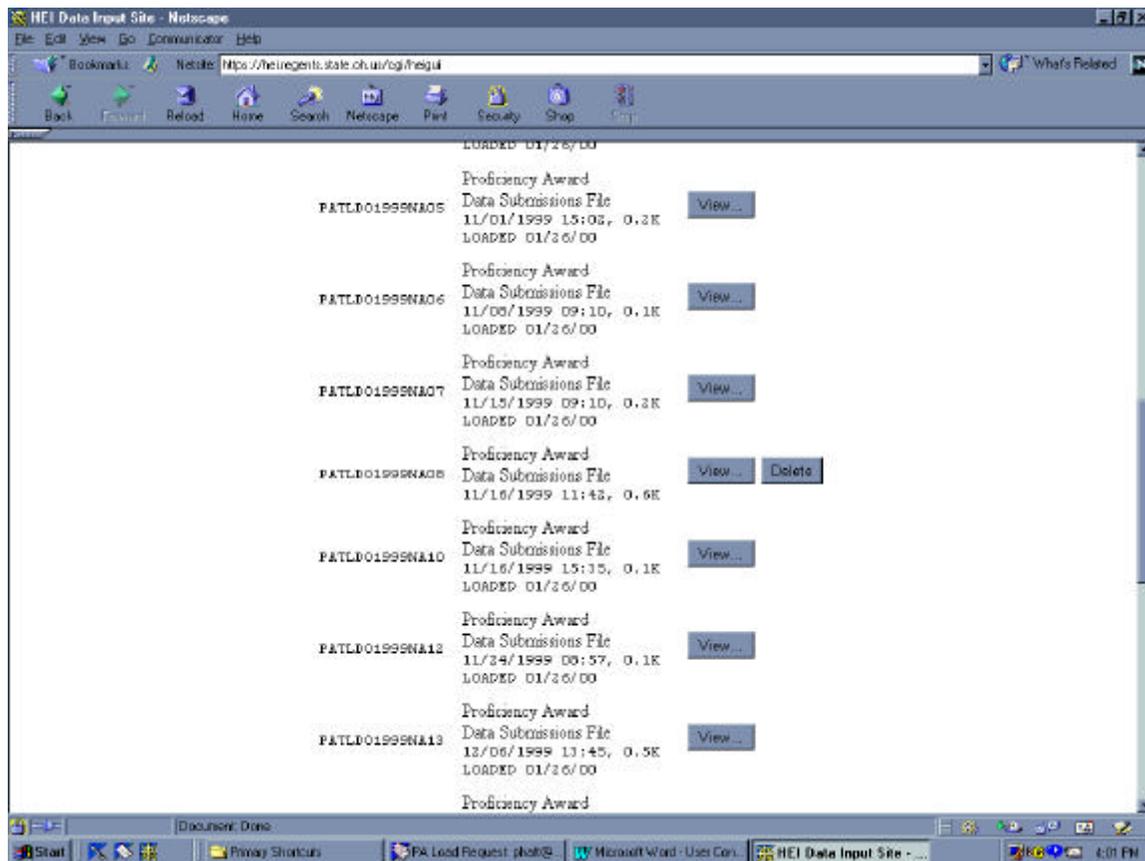


Fig. 6

➤ Viewing file and edit results

Select View at Data Input Site
(See Fig. 6 above)

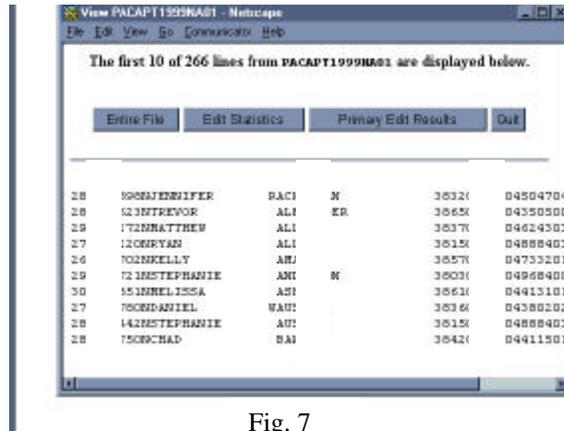


Fig. 7

Select Edit Statistics to see a summary of the
for the
file. This is also sent to the e-mail
address of data reporter who submitted the

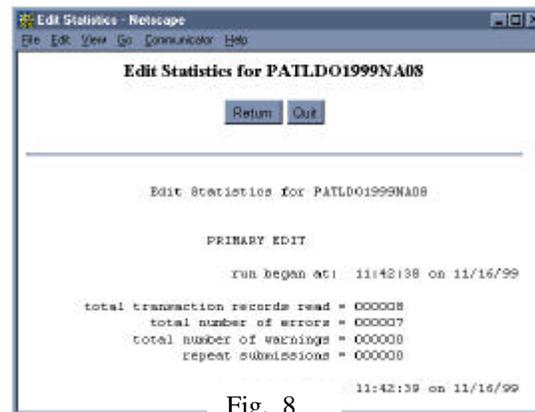


Fig. 8

edit results
file.

Select Primary Edit Results to view
the detail regarding any errors.

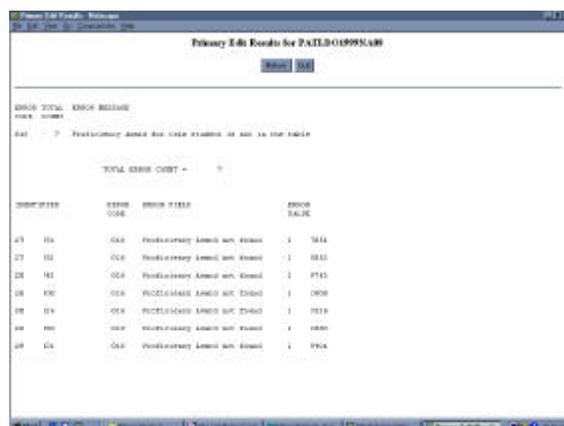


Fig. 9

For details on edits performed to submitted record, you can view the edit and load specifications at:
<http://www.regents.state.oh.us/hei/datasubdoc/finaid/paedit.html>

➤ PA Query at [https://hei.regents.state.oh.us/cgi/HEInet.cgi?\\$sp_html_hei_pa_query%20%2713.0%27](https://hei.regents.state.oh.us/cgi/HEInet.cgi?$sp_html_hei_pa_query%20%2713.0%27)



Using the PA Query requires Restricted Output access and can be used by those with authorization for the PA data area only.

Enter as many fields as you wish to narrow your search for a specific student record or group of student records

Note: The School ID is the high school number printed on the voucher and should not be confused with your 4-character HEI institution identifier.

In most queries you will want to view Current Status. Do not select Current Status if you want a transaction history.

Query Criteria			
Institution Caterham College		Student Identifier <input type="text"/> <i>(uses LIKE operator)</i>	
First Name <input type="text"/> <i>(uses LIKE operator)</i>	Middle Initial <input type="text"/> <i>(uses LIKE operator)</i>	Last Name <input type="text"/> <i>(uses LIKE operator)</i>	
Voucher ID <input type="text"/> <i>(uses LIKE operator)</i>	School ID <input type="text"/> <i>(uses LIKE operator)</i>	Year Enrolled 2000 1999	Term Enrolled AU SM EP WM
Status Date <input type="checkbox"/> Current Status through through (inclusive)		Status Code NS NR NN NC AS PR	

Fig. 10

Acceptable date formats

- MM/DD/YY
- MM/DD/YYYY
- MM-DD-YY
- MM-DD-YYYY

One, some or all Status Codes can be selected in your query.

Status Code	
Code	Description
NS	Submitted to NCS
NR	Rejected by NCS
NN	Name Rejected by NCS
NC	Confirmed by NCS
AS	Submitted to Accounting
PR	Payment Requested
LD	Award Loaded

➤ Customizing the output from the PA Query

Use Optional Attributes to limit the columns in your output.

Optional Attributes to Display

No Optional Attributes

Institution
First Name
Middle Initial
Last Name
Voucher ID
School ID

Spreadsheet Include SQL at End
 Fixed Record ASCII Exclude SQL at End

Add Title & Test Information to Query Submit Query Clear Selections
Terminate Query

Display Previously Run Queries

Starting	Month	01	Day	01	Year	1999	
Ending	Month	03	Day	15	Year	2000	Go

Fig. 12

Output can be generated using one of two options- spreadsheet or ASCII

The advantages of the spreadsheet format are:

- You have the ability to sort rows.
- You have the ability to rearrange the order of columns.
- You have the ability to calculate subtotals and totals.

Note: You must have spreadsheet software on your PC and you must associate it through Navigators Preference setup.

The advantages of the Fixed Record ASCII format are:

- You have a file without embedded formatting to better enable you to upload the data to a mainframe or other database or to paste to a wordprocessing document.

Select Include SQL at End If you wish to include the text defining the SQL (Structured Query Language) used for your query.

You may choose to Add Title if you plan to distribute the results of your query as a report.

Fixed Record Form - Message

File Edit View Go Commands Help

Title of Report: (fill in here)
Terms Covered by Report: (fill in here)
Report Prepared by: (fill in here)

Submit Cancel