

OSAC Partner Portal Training: Navigating the Deep

OASFAA 2024

Jennifer Bruce, Scholarship Portfolio Coordinator

Anel Venegas-Trujillo, Oregon Teacher Scholars Program Coordinator

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Creating an account

Financial Aid Office access:

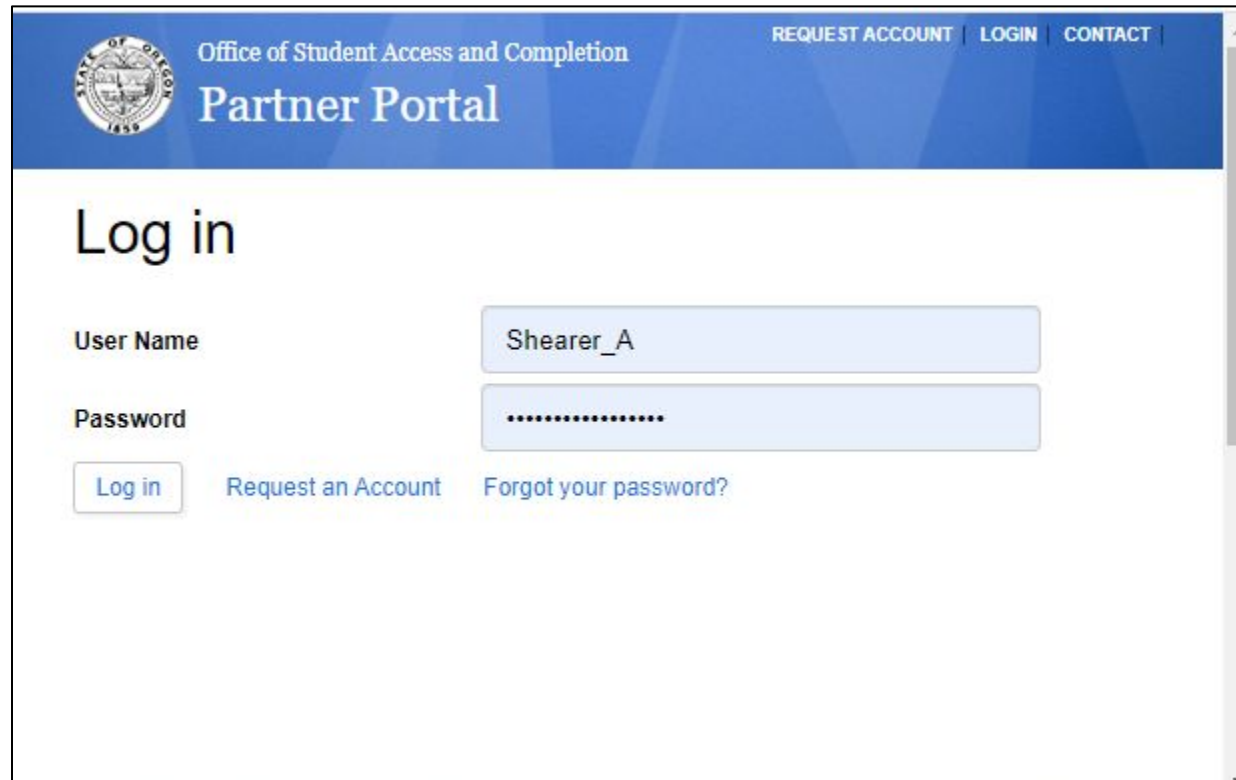
- Email PartnerPortalSupport@hecc.oregon.gov or complete our email contact form on our website
 - Request needs to come from supervisor of employee needing access
 - Include the new hire's (or existing OSAC user):
 - Name
 - Email
 - Title
 - Contact phone number
 - Which OSAC programs to access
 - School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



The screenshot shows the login interface for the Oregon Student Access and Completion Partner Portal. The header is blue and contains the Oregon State seal, the text "Office of Student Access and Completion", and the title "Partner Portal". Navigation links for "REQUEST ACCOUNT", "LOGIN", and "CONTACT" are in the top right. The main content area is white and features a "Log in" heading. Below the heading are two input fields: "User Name" with the value "Shearer_A" and "Password" with masked characters. At the bottom of the form are three buttons: "Log in", "Request an Account", and "Forgot your password?".

Dashboard

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](#)

College Partner Portal

Colleges

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 \(PDF file\)](#)
- [Disbursement Processing System User Guide, 2021 \(PDF file\)](#)
- [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.

Batch File Year

2022-23

Batch File

Choose File No file chosen

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).

Academic Year

2022-23

SSN

Last Name

First Name

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

Acad Year

Trm #

EFC

AGI

Rmn Elig Terms

Trm1 Auth

Trm2 Auth

Trm3 Auth

FT Full Year Amt

HT Full Year Amt

Total Dsb

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.

Batch File Year

2022-23



Batch File

Choose File No file chosen

Opportunity Grant

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

- 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).

Academic Year: SSN: Last Name: First Name:

Query Selection Choice: Complete List of Students By Batch List of SSNs By Search Criterion

Click for List History	Last Name	First Name	MI	Acd Year	Trn #	EFC	AGI	Rmn Elig Terms	Trm1 Auth	Trm2 Auth	Trm3 Auth	FT Full Year Amt	HT Full Year Amt	Total Dsb
--	-----------	------------	----	----------	-------	-----	-----	----------------	-----------	-----------	-----------	------------------	------------------	-----------

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).

Academic Year	List Date	Change Status	Reason Code															
2022-23	01/16/2023	- Not Selected -	- Not Selected -															
SSN	Last Name	First Name	OSAC/Person Id															
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>															
Display using Filters		Export List to Excel																
Acd Year	List Date	Change Status	Trn #	Reason Code	Awarded	SSN	Last Name	First Name	MI	Rmn Elig Terms	Trm1 Auth	Trm2 Auth	Trm3 Auth	FT Full Year Amt	HT Full Year Amt	Total Dsb	EFC	AGI

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).

Academic Year: 2022-23 | List Date: 01/16/2023 | Change Status: - Not Selected -

SSN: | Last Name: | First Name:

Display using Filters | Export List to Excel

Acad Year	List Date	Change Status	SSN	Last Name	First Name	MI	FAFSA File Date	Trn #	Reason Code	Rmn Elig Terms	FT Full Year Amt	HT Full Year Amt	SRM FT Amt if not LATE	SRM HT Amt if not LATE	EFC	AGI
-----------	-----------	---------------	-----	-----------	------------	----	-----------------	-------	-------------	----------------	------------------	------------------	------------------------	------------------------	-----	-----

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

Single Request Academic Year

Social Security Number

Transaction Number

2022-23



[Submit Single Lock Request](#)

Bulk Request Academic Year

UploadFile

2022-23



Choose File

No file chosen

[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](#)

Opportunity Grant

OSAC Grants Disbursement Reporting Schedule 2023-24

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

Semester/Quarter	Week Term Begins	Reporting Period
Fall semester	8/28/2023	11/6/2023 - 11/22/2023 (2.5 weeks)
Fall quarter	9/25/2023	11/6/2023 - 11/22/2023 (2.5 weeks)
Winter quarter	1/8/2024	2/12/2024 - 2/23/2024 (2 weeks)
Spring semester	1/8/2024	3/11/2024 - 3/22/2024 (2 weeks)
Spring quarter	4/1/2024	5/6/2024 - 5/17/2024 (2 weeks)
Year-end reconciliation		6/10/2024 - 6/21/2024 (2 weeks)

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 \(PDF file\)](#)
- [Disbursement Processing System User Guide, 2021 \(PDF file\)](#)
- [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).

Academic Year: 2023-24 | List Date: 12/25/2023 | Change Status: - Not Selected - | Reason Code: - Not Selected -

SSN: | Last Name: | First Name: |

Display using Filters | Export List to Excel | 1 2 3 4 5 6 7 8 9 10 » ... 58 (2874 results)

Acad Year	List Date	Change Status	Trn #	Reason Code	Awarded	SSN	Last Name	First Name	Trm3 Auth
2023-24	12/25/2023		02	D	<input type="checkbox"/>				
2023-24	12/25/2023		02		<input checked="" type="checkbox"/>				\$0
2023-24	12/25/2023		04	ED	<input type="checkbox"/>				\$0
2023-24	12/25/2023		02	ED	<input type="checkbox"/>				\$0

- Not Selected -

- A - Not accepted
- B - College added after block
- C - Not eligible based on SRM calculation - possible high EFC?
- D - FAFSA received after award cut-off date
- E - EFC Above Current Max Allowed EFC cut-off
- G - Graduate student
- H - OSAC hold on application
- I - Ineligible based on income
- L - Less than FT awd remaining, or low remaining elig and previous yr not compl
- N - Non-resident
- O - Rejected ORSAA
- P - Pell ineligible (only for grandfathered awards)
- S - Stop award
- T - Does not qualify for Tuition Equity
- X - Expired eligibility
- Z - Non-citizen

Oregon Promise

Oregon Promise Reported Students

Chemeketa 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.

Academic Year: 2022-23 Term: [dropdown]
Student Id: [input] Last Name: [input] First Name: [input] Date of Birth: mm/dd/yyyy [calendar icon]
Is Matched?: [dropdown] Is Authorized: [dropdown] Is Correct Amount?: [dropdown] Is Tolerable Amount?: [dropdown] Is Disbursement Selected?: [dropdown]

[Search](#) [Clear](#) [Export List to Excel](#)

1 2 3 4 5 6 7 8 9 10 » ... 34 (1667 results)

Student Id	Name	Matched	Total Credits Attempted	Total Dollars Disbursed	Details
[redacted]	[redacted]	True	14.00	667	Chemeketa Community College, FallQuarter, 667, 14.00, 0.00, Selected , Authorized, Correct Amount Tolerable Amount (Delta: 0)



Chafee

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).

Academic Year

All Years ▼

Award Status

- All codes - ▼

Display Results

Results to Excel

There are no students eligible for a Chafee

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

and award status) at your school.

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

ABC University (000000) for Academic Year 2023-24

Last or First or SSN

AppYear

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 in writing by 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 our office.

Academic Year: 2022-23 | List Date: 1/30/2023 | Change Status: - Not Selected - | Fund: - Not Selected -

SSN: | Last Name: | First Name: | [Display using Filters](#) | [Export List to Excel](#)

[Acad Year](#) | [List Date](#) | [Change Status](#) | [Last Name](#) | [First Name](#) | [Award Status](#) | [Fund Code](#) | [Fund Name](#) | [Award Amount](#)

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: 02/01/2022 | Batch Date Before: mm/dd/yyyy

Batch #: | SSN: | [Query](#) | [Export to Excel](#)

OFAX

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

DASHBOARD FOLDER CHEMEKETA COMMUNITY COLLEGE,

OFAX Upload Data

Chemeketa Community College (003218)

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

1. Step 1. Select the document to upload:

Select file:

UploadFile

Choose File

No file chosen

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

Upload File

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.

ORSAA ISIR Search

ABC University (000000) for Academic Year 2023-24

Academic Year	Last Name	First Name	BirthDate
2023-24	<input type="text"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>

Year Indicator Transaction Number Last Name First Name Birth Date

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.

Degree Type	1st Degree	SAP	Beg. Enrollment Status	COA	SEOG	OSAC grants/scholarships	Other grants/scholarships	OOG	OPG	PELL	OTSG	Notes	OTSG Awarded
--	<input type="checkbox"/>	<input type="checkbox"/>	--		0	0					0		0

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)

ABC University Folder

Shared By OSAC

OSAC has not yet shared any files with this group

Shared by ABC University

File	Date	
 <input type="button" value="Choose File"/> No file chosen		<input type="button" value="Upload"/>
 000000_10_24_16_11_cats.pdf	10/24/2022 4:11:28 PM	<input type="button" value="Remove"/>
 000000_3_15_8_57_ATestDocument.docx	3/15/2011 8:57:25 AM	<input type="button" value="Remove"/>

Need help?

- Contact/feedback button

DASHBOARD FOLDER SCHOLARSHIPS MCKAY HIGH SCHOOL > COLLEGES >

Feedback Form

Name

Institution

Phone Number

Phone Extension

Question or Feedback

[Send Feedback](#)

Thank you!

Jennifer.Bruce@hecc.oregon.gov

Anel.Venegas-Trujillo@hecc.oregon.gov