

Student Financial Aid System Modernization (SFASM)

GLASS System/Application Training



Training Agenda

- HEAB Staff Introductions
- D GLASS Timeline, Resources & Environments
- D Training Participant Questions
- B Training Scope: Grants & Scholarships
- B Training Topic 1: Access & IT Support
- D Training Topic 2: Overview
- D Next Steps

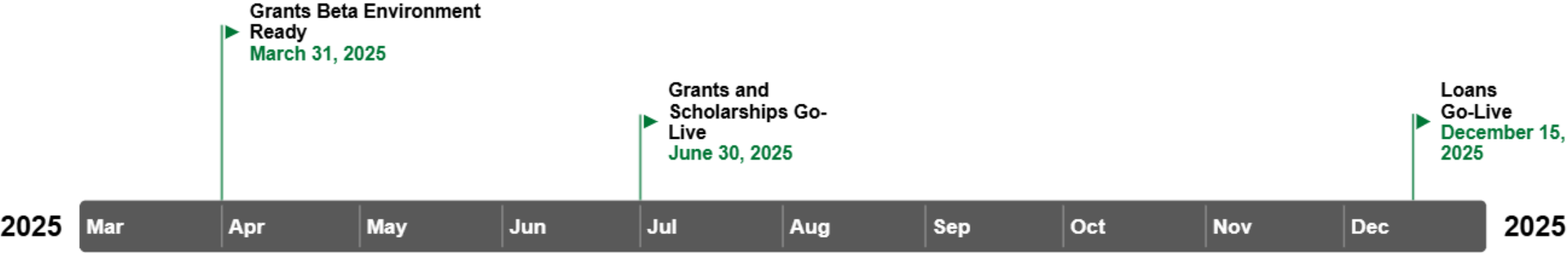


HEAB Staff Introductions

Staff Names and Roles	
Dennis Kohlmeier	Project Manager
Tammie DeVooght-Blaney	Executive Secretary
Sherrie Nelson	Policy Advisor
Barb Moermond	IS Operations Support Tech-Senior
Joy Dyer	Grants Specialist
Jody Gennrich	Grants Specialist
Peter Zammuto	Grants Specialist
Cassie Weisensel	Grants Specialist
Elizabeth Misel	Administrative Financial Program Coordinator



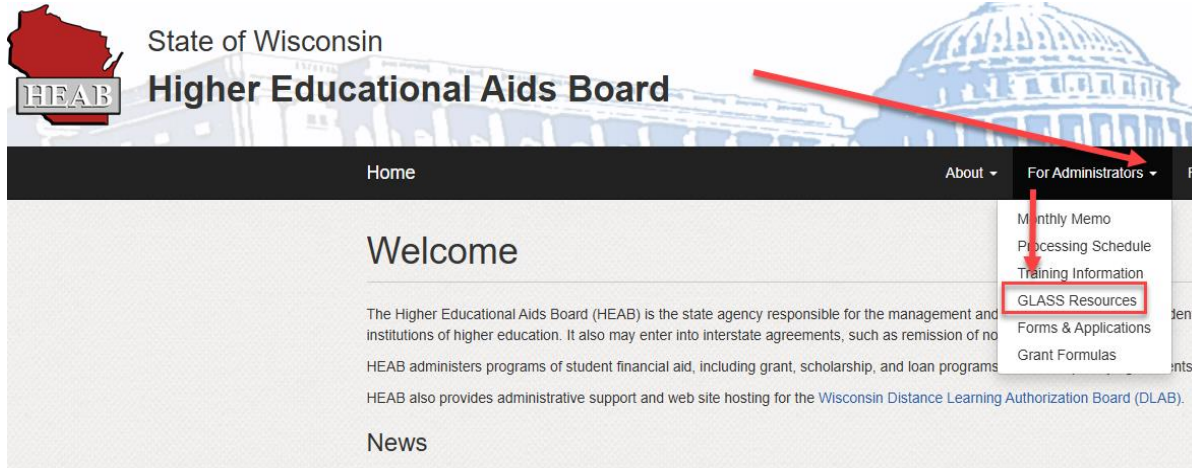
Timeline



Note: Beta is an environment where the GLASS application is ready to use without significant [bugs](#). In this environment, all features of the GLASS application have been designed, coded, and tested through multiple test cycles. There are no known bugs that prevent functionality of the GLASS application.



Reference Resources



Updated on a regular basis. Please check back periodically.

HEAB Website (GLASS Resources): [WI Higher Educational Aids Board - GLASS Resources](#)



Environments

Environment	Availability	Purpose
Test / UAT	Used for testing.	This will be the testing environment after the production go-live for grants.
Beta	Until late June 2025.	<p>This is an environment for schools to use the full functionality of GLASS on a daily basis before the production go-live. <u>On or before June 30th, 2025, beta will become the production environment.</u></p> <p>Important:</p> <ol style="list-style-type: none">1. When beta becomes production, you will need to go through the same ID approval as with rebuilds in beta.2. After beta becomes the production environment, any further testing will be performed in the Test / UAT environment. <p>Watch for communications from HEAB. These communications will notify you of changes to the beta/production environment.</p>



Training Participants Questions

- Please put your questions in the chat.
- Staff will verbally answer the question during the call.
- The questions and answers will go into the FAQs, which will be posted on the HEAB site.
- This session:
 - is recorded; and
 - the recording is available on the GLASS Resources page on the HEAB Website:
<https://heab.state.wi.us/glassresources.html>



Training Scope: Grants

[Wisconsin Grant - UW, Tech & Tribal](#)

The Wisconsin Grant (WG) Program provides grant assistance to undergraduate, Wisconsin residents enrolled at least half-time in degree or certificate programs at University of Wisconsin, Wisconsin Technical College, and Tribal institutions.

[Wisconsin Grant - Private Non-Profit](#)

The Wisconsin Grant (WG-PNP) Program provides grant assistance to undergraduate, Wisconsin residents enrolled at least half-time in degree or certificate programs at non-profit, independent colleges or universities based in Wisconsin. Awards are based on financial need and partially based on that portion of tuition in excess of UW - Madison tuition.

[Talent Incentive Program Grant](#)

The Talent Incentive Program (TIP) Grant provides grant assistance to the most financially needy and educationally disadvantaged Wisconsin resident students attending colleges and universities in the State of Wisconsin.

[Indian Student Assistance Grant](#)

Awards under this program are made to Wisconsin residents who are at least 25% Native American and are undergraduate or graduate students enrolled in degree or certificate programs at University of Wisconsin, Wisconsin Technical College, independent colleges and universities, tribal colleges, or proprietary institutions based in Wisconsin.

[Minority Undergraduate Retention Grant](#)

Awards under this program are made to Wisconsin resident minority undergraduates, excluding first year students, enrolled at least half-time in independent, tribal, or Wisconsin Technical College institutions. According to the statutes, a minority student is defined as a student who is either an African American; American Indian; Hispanic; or Southeast Asian from Laos, Cambodia, or Vietnam admitted to the U. S. after December 31, 1975.

[Hearing/Visually Handicapped Student Grant](#)

Hearing/Visually Impaired Student Grant Program was established to provide funding for undergraduate Wisconsin residents, enrolled at in-state or eligible out-of-state public or private.



Training Scope: Scholarships

Scholarships

[WI Higher Educational Aids Board - Academic Excellence Scholarship](#)

Academic Excellence Scholarships (AES) are awarded to Wisconsin high school seniors who have the highest-grade point average (GPA) in each public and private high school throughout the State of Wisconsin.

[WI Higher Educational Aids Board - Technical Excellence Scholarship](#)

Technical Excellence Scholarships (TES) is awarded by the State of Wisconsin to Wisconsin high school seniors who have the highest demonstrated level of proficiency in technical education subjects.



Training Topic 1: IT Support

- **Roster File Layouts**
- **Institution Initiated Certification File Tips**
 - **No Headers**
 - **Two Commas at End of Each Record, except for Herzing**
 - **Double Check Program Short Name (Refer to FAQ on HEAB GLASS Resource page)**



Training Topic 2: Overview

- **Student Search**
- **Edit Student**
- **Payment Requests**
- **Reports and Rosters**
- **Edit Institution**
- **MyWisconsinID (addendum)**
- **GLASS Login (addendum)**
- **Certification Process (addendum)**

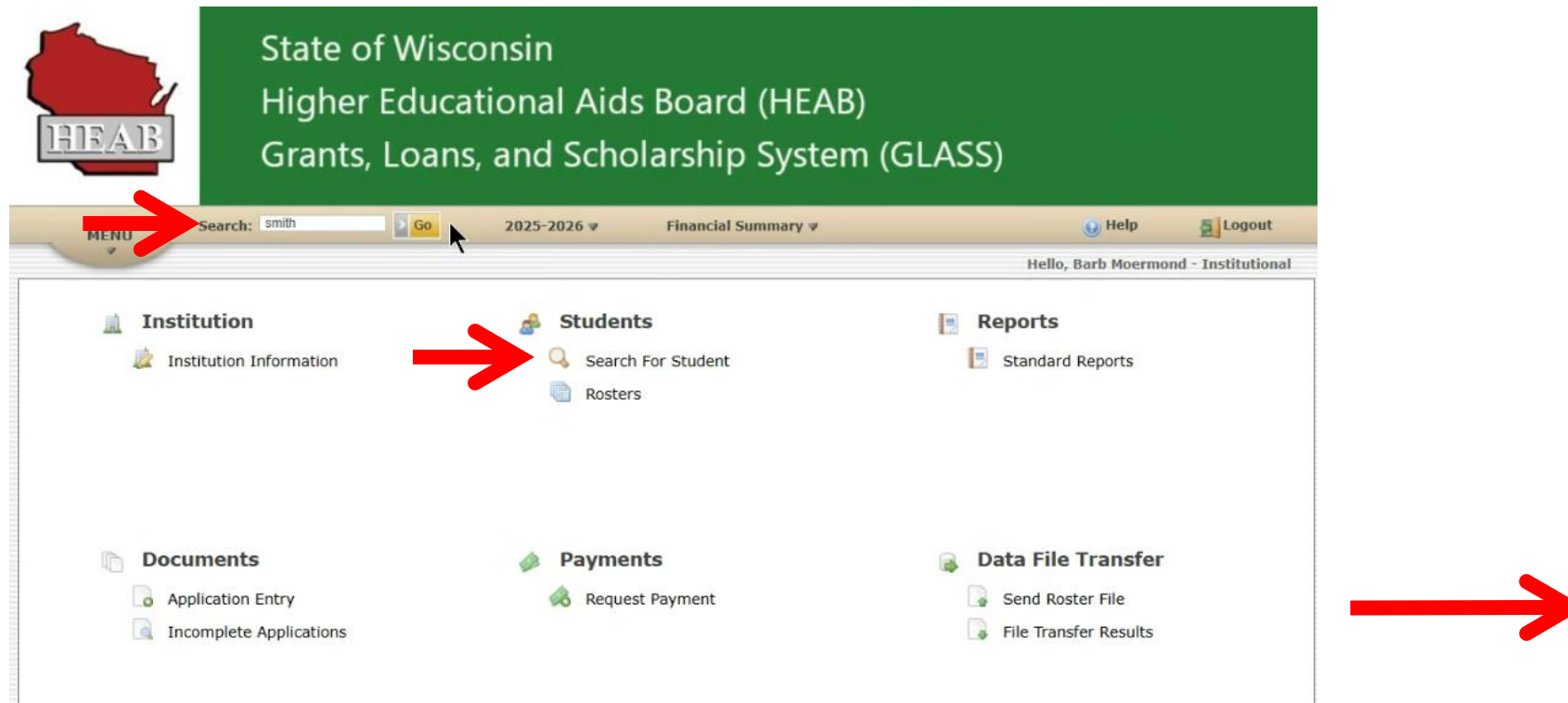


Student Search




Search Student – Step 1

Go to home page then either (1) select **Search for Student** or (2) use the **Search field** along the menu bar near the top of the page and then click **Go**.



Search Student – Step 2

You will see a page like the below.



State of Wisconsin
Higher Educational Aids Board (HEAB)
Grants, Loans, and Scholarship System (GLASS)

MENU

Search:

2025-2026 Financial Summary

Hello, Barb Moermond - Institutional

[HOME](#) > Student Result Set

Enter the student information you wish to search for in the box below, and click [Search] to locate that student.

Search Criteria

☒ Active Year ☐ All Years

Last Name	<input type="text"/>	First Name	<input type="text"/>	MI	<input type="text"/>
SSN	<input type="text"/>	DOB	<input type="text"/>	Student ID	<input type="text"/>
City	<input type="text"/>	State	All States <input type="button" value="v"/>	Zip	<input type="text"/>
Email	<input type="text"/>		Campus ID	<input type="text"/>	

Search Results

Found 23 students.

GLASS ID	Last Name	First Name	Social Security	Birth Date
196785	SMITH	ALAN	###-##-#797	03/21/1999
721245	Smith	Alyssa	###-##-#226	10/06/1999
67085	Smith	Andre	###-##-#104	04/11/2000




Edit Student



Edit Student

After you have selected a student from the search functionality, you will see the **Edit Student** page.



State of Wisconsin
Higher Educational Aids Board (HEAB)
Grants, Loans, and Scholarship System (GLASS)

MENU

Search: Go

2025-2026 Financial Summary Help Logout

Hello, Barb Moermond - Institutional

HOME > Student Result Set > Edit Student

SMITH, ALAN A - ###-##-#797

MILWAUKEE, WI

GLASS ID: 196785

General Information

DOB: 3/21/1999

Academic Period Information

FAFSA Information

View All ISIR Records

Transaction #:	01	Transaction Date:	01/08/2025	Application Date:	01/08/2025
ISIR Dependency Status:	I	SAR C Flag:		Student IRS Request Flag:	
SSN Match Flag:	4	SSN Change Flag:		Parent IRS Request Flag:	
SSA Citizenship Match Flag:	A	DHS Match:		Secondary DHS Match:	
Name ID:		Year in College:	2	NSLDS Match Flag:	1
Federal School/Pell Code 1:		Federal School/Pell Code 2:	014203	Federal School/Pell Code 3:	015511
Federal School/Pell Name 1:		Federal School/Pell Name 2:	MILWAUKEE INST OF ART	Federal School/Pell Name 3:	MEDICAL COLLEGE OF W
SAI:	-1500	Dependency Override Indicator:		Professional Judgement:	
First Bachelor's Degree:	N	Dependency Override School:		Professional Judgement School:	
		DO HEAB Code:		PJ HEAB Code:	

Credits and GPA

Document Tracking

Comments

Payment History

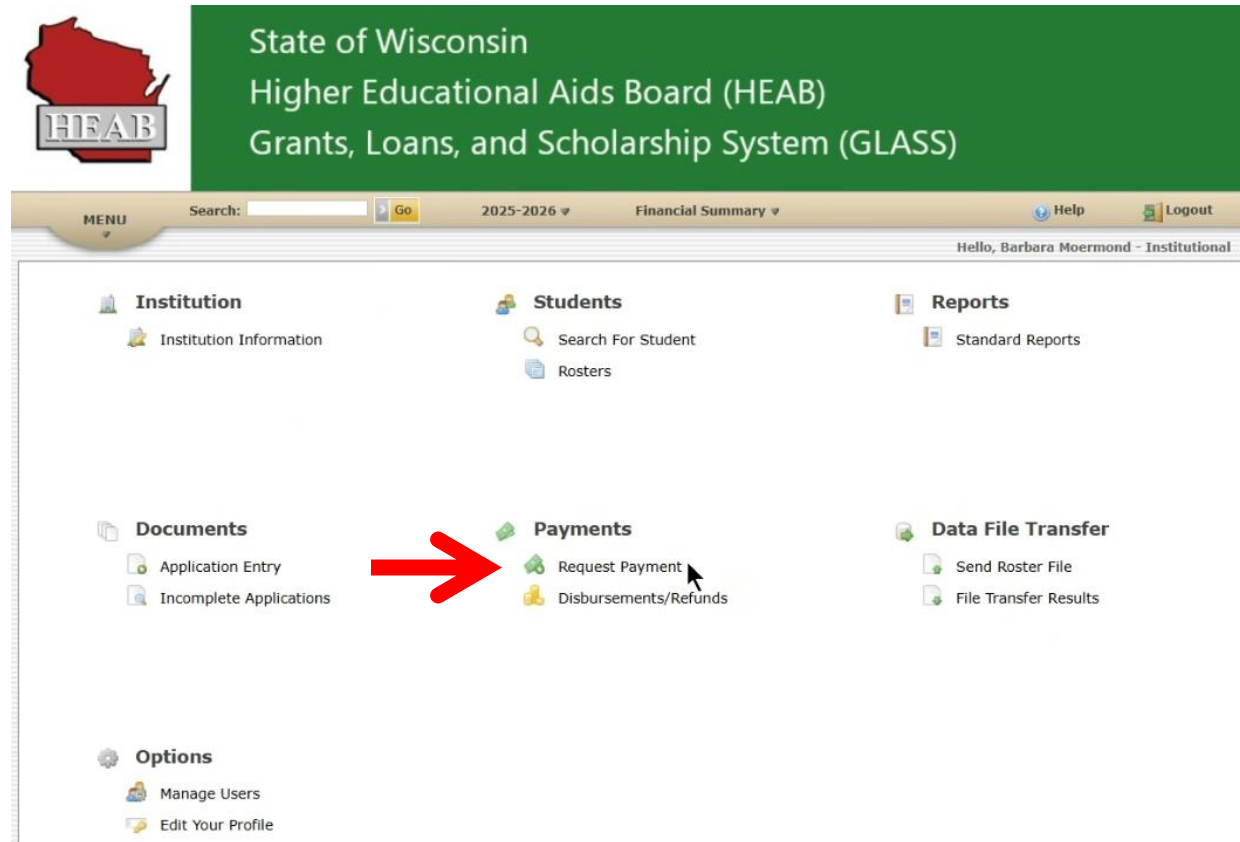


Payment Requests



Payment Requests – Step 1

Go to home page then select ***Request Payment***.



Payment Requests – Step 2

Either select all check box at top to select all lines.



State of Wisconsin
Higher Educational Aids Board (HEAB)
Grants, Loans, and Scholarship System (GLASS)

2025-2026 Financial Summary Help Logout

HOME > Institutional Request Payment

Payment Verification Requested but Not Paid: \$0.00 - Not Yet Requested: \$867,588.00

<input checked="" type="checkbox"/>	Program	Term	Certified Amount	Request Date	Status	View Details
<input checked="" type="checkbox"/>	WG-TC	Fall	\$854,388.00		Not Yet Requested	Details
<input checked="" type="checkbox"/>	TIP	Fall	\$13,200.00		Not Yet Requested	Details

Selected Payments
Total of payments currently selected for this request: \$867,588.00 [Request Payment](#)

Program	Allocation	Disbursed	Requested	Allocation Remaining
---------	------------	-----------	-----------	----------------------

[Return to Main Menu](#)

Or select individual line items.



State of Wisconsin
Higher Educational Aids Board (HEAB)
Grants, Loans, and Scholarship System (GLASS)

2025-2026 Financial Summary Help Logout

HOME > Institutional Request Payment

Payment Verification Requested but Not Paid: \$0.00 - Not Yet Requested: \$867,588.00

<input type="checkbox"/>	Program	Term	Certified Amount	Request Date	Status	View Details
<input type="checkbox"/>	WG-TC	Fall	\$854,388.00		Not Yet Requested	Details
<input checked="" type="checkbox"/>	TIP	Fall	\$13,200.00		Not Yet Requested	Details

Selected Payments
Total of payments currently selected for this request: \$13,200.00 [Request Payment](#)


Program	Allocation	Disbursed	Requested	Allocation Remaining
---------	------------	-----------	-----------	----------------------

[Return to Main Menu](#)



Payment Requests – Step 3

Click on the **Request Payment** button.



State of Wisconsin
Higher Educational Aids Board (HEAB)
Grants, Loans, and Scholarship System (GLASS)

MENU

Search:

2025-2026

Financial Summary

Hello, Barbara Moermond - Institutional

HOME > Institutional Request Payment

Payment Verification

Requested but Not Paid: \$0.00 - Not Yet Requested: \$867,588.00

<input type="checkbox"/>	Program	Term	Certified Amount	Request Date	Status	View Details
<input type="checkbox"/>	WG-TC	Fall	\$854,388.00		Not Yet Requested	Details
<input checked="" type="checkbox"/>	TIP	Fall	\$13,200.00		Not Yet Requested	Details

Selected Payments

Total of payments currently selected for this request: \$13,200.00


Program	Allocation	Disbursed	Requested	Allocation Remaining
---------	------------	-----------	-----------	----------------------

[Return to Main Menu](#)



Payment Requests – Step 4

Once you select **Request Payment**, you will see the below message.



State of Wisconsin
Higher Educational Aids Board (HEAB)
Grants, Loans, and Scholarship System (GLASS)

MENU Search: Go 2025-2026 Financial Summary Help Logout

Hello, Barbara Moermond - Institutional

HOME > Institutional Request Payment

Payment has been requested. ←

Payment Verification Requested but Not Paid: \$13,200.00 - Not Yet Requested: \$854,388.00

<input type="checkbox"/>	Program	Term	Certified Amount	Request Date	Status	View Details
<input type="checkbox"/>	WG-TC	Fall	\$854,388.00		Not Yet Requested	Details
<input checked="" type="checkbox"/>	TIP	Fall	\$13,200.00	6/6/2025 12:00:00 AM	Requested	Details

Selected Payments

Total of payments currently selected for this request: \$0.00

Request Payment

Program	Allocation	Disbursed	Requested	Allocation Remaining
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Return to Main Menu

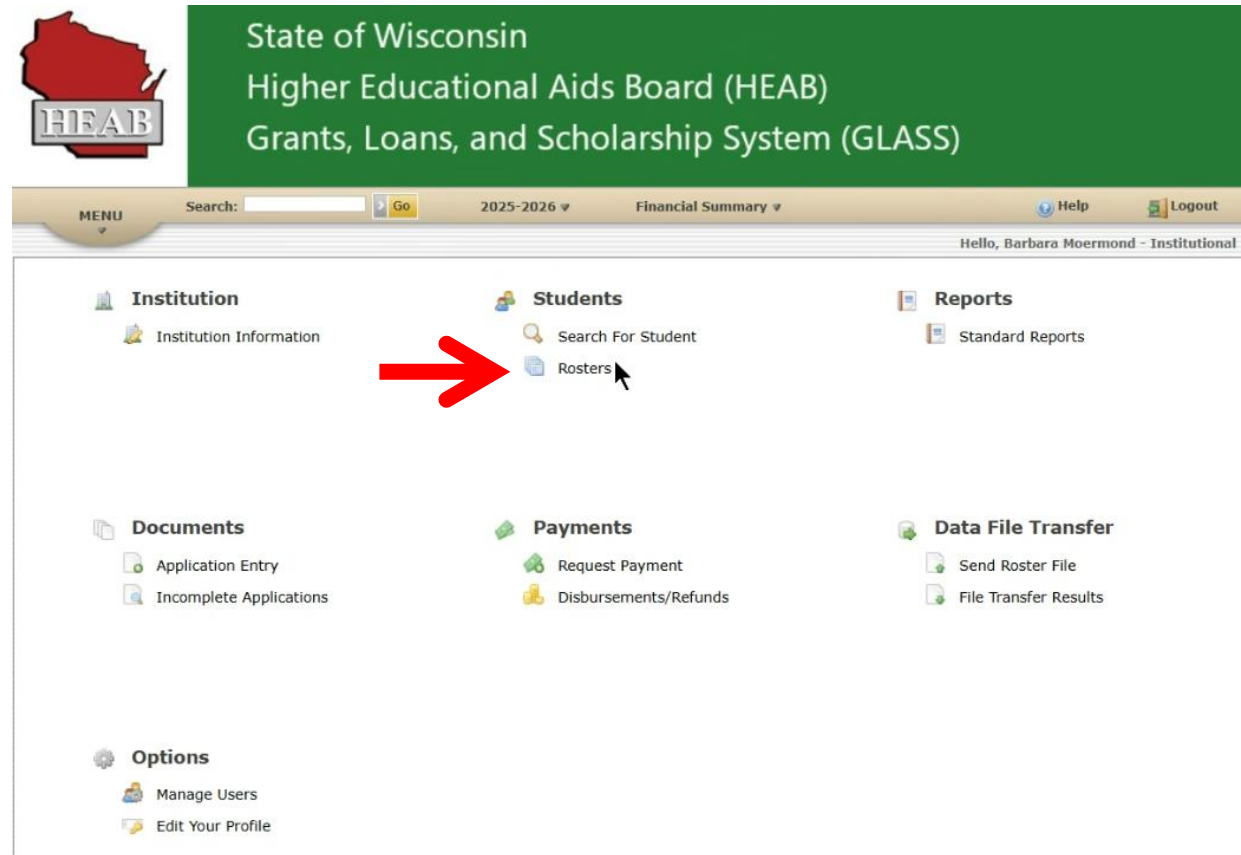


Rosters and Reports




Rosters – Step 1

Go to home page then select **Rosters**.



Rosters – Step 2

You will then see the following page.



State of Wisconsin
Higher Educational Aids Board (HEAB)
Grants, Loans, and Scholarship System (GLASS)

Search: [Go](#) 2025-2026 Financial Summary [Help](#) [Logout](#)

Hello, Barbara Moermond - Institutional

HOME > Roster Selection

You are currently working with the 2025-2026 Academic Year.
There is action you must take for the rosters in the Certification Rosters section. The rosters in the Informational Rosters section are for reference and reporting purposes.

Program:

All Programs

Term:

Fall

SSN:

First Name:

Last Name:

Student ID:

Certification Rosters - Action Required

	View and Print (PDF)	Certify Online	Download File (CSV)
Certification	PDF	Online	Download
Credits and GPA	PDF	Online	Download

Informational Rosters

Certification Rosters - Action Required

	View and Print (PDF)	Certify Online	Download File (CSV)
Certification	PDF	Online	Download
Credits and GPA	PDF	Online	Download

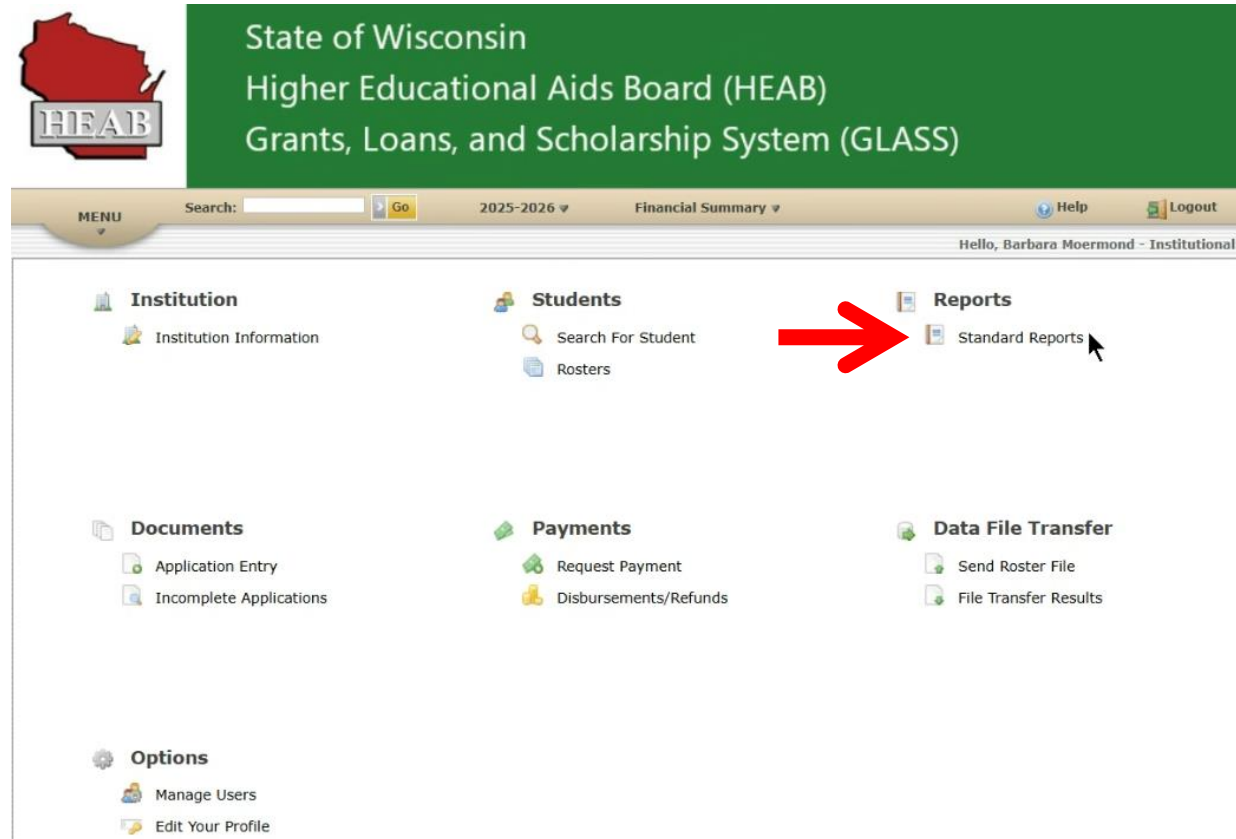
Informational Rosters

	View and Print (PDF)	View Online	Download File (CSV)
Offered Roster	PDF	Online	Download
Offered and Certified	PDF	Online	Download
Certified and Not Paid	PDF	Online	Download
Paid	PDF	Online	Download
Refund Due	PDF	Online	Download
Application Complete	PDF	Online	Download
Ineligible	PDF	Online	Download
Incomplete	PDF	Online	Download
All Students	PDF	Online	Download
Credits and GPA Reported	PDF	Online	Download

24

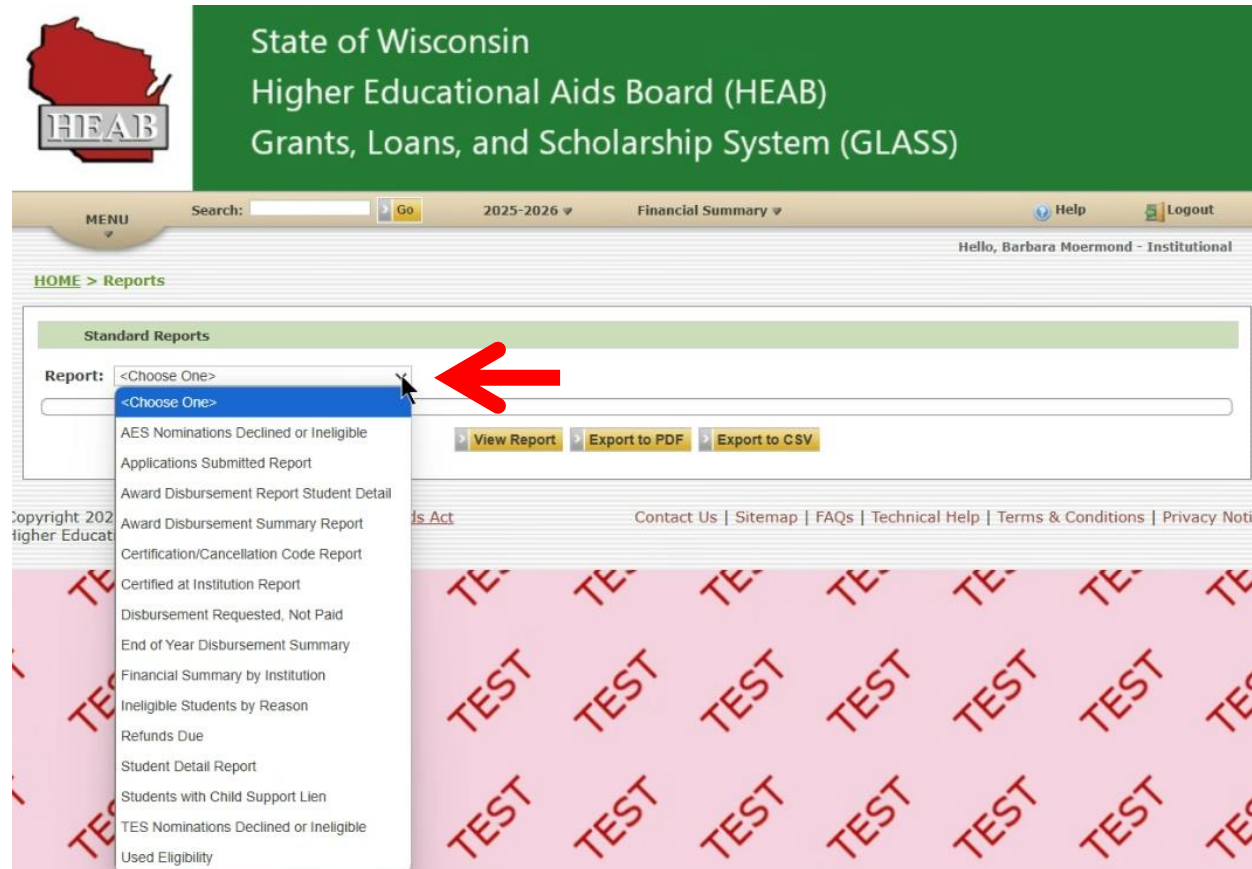
Reports – Step 1

Go to home page then select **Standard Reports**.



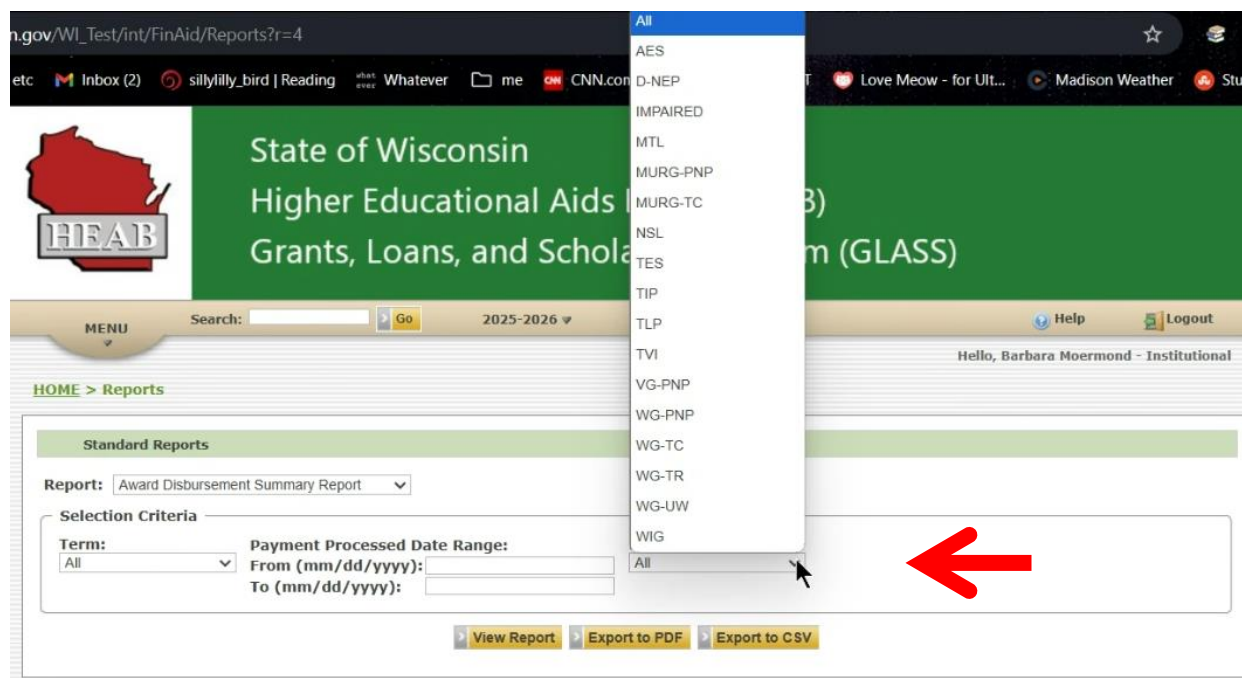
Reports – Step 2

On the page that appears (see below), click on the report box dropdown.



Reports – Step 3

Then choose a report (for example, the **Award Disbursement Summary Report**). Some of reports require a few parameters to be selected/filled out.



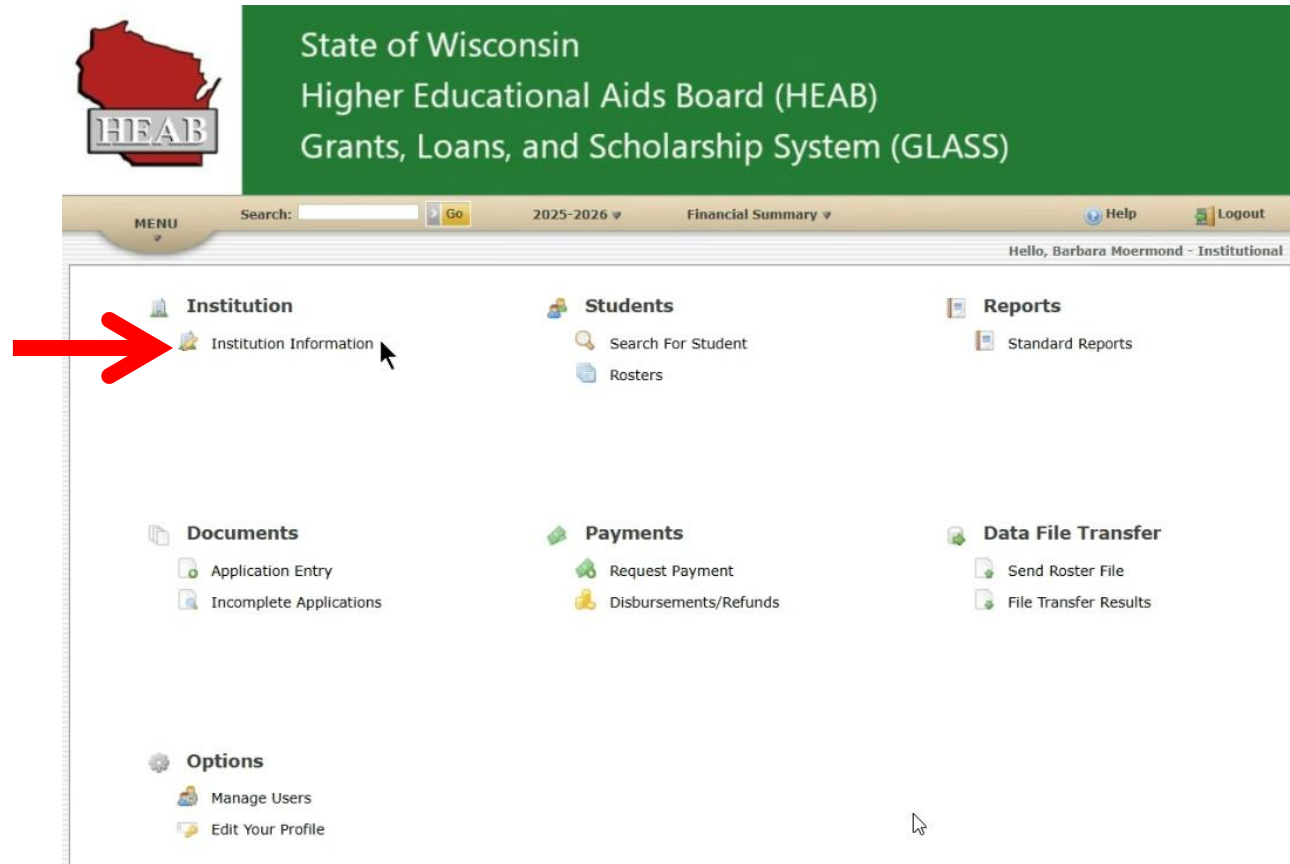
The screenshot shows the HEAB (Higher Educational Aids Board) website interface. The header includes the HEAB logo and the text "State of Wisconsin Higher Educational Aids Board Grants, Loans, and Scholarships". A navigation menu is visible, and a search bar is present. The main content area is titled "Standard Reports". Under this section, there is a dropdown menu for "Report:" which is currently set to "Award Disbursement Summary Report". Below this, there is a "Selection Criteria" section with a "Term:" dropdown set to "All" and a "Payment Processed Date Range:" section with "From (mm/dd/yyyy):" and "To (mm/dd/yyyy):" input fields. A dropdown menu is open, listing various report types: All, AES, D-NEP, IMPAIRED, MTL, MURG-PNP, MURG-TC, NSL, TES, TIP, TLP, TVI, VG-PNP, WG-PNP, WG-TC, WG-TR, WG-UW, WIG, and All. A red arrow points to the "All" option at the bottom of the list. At the bottom of the form, there are buttons for "View Report", "Export to PDF", and "Export to CSV".

Edit Institution



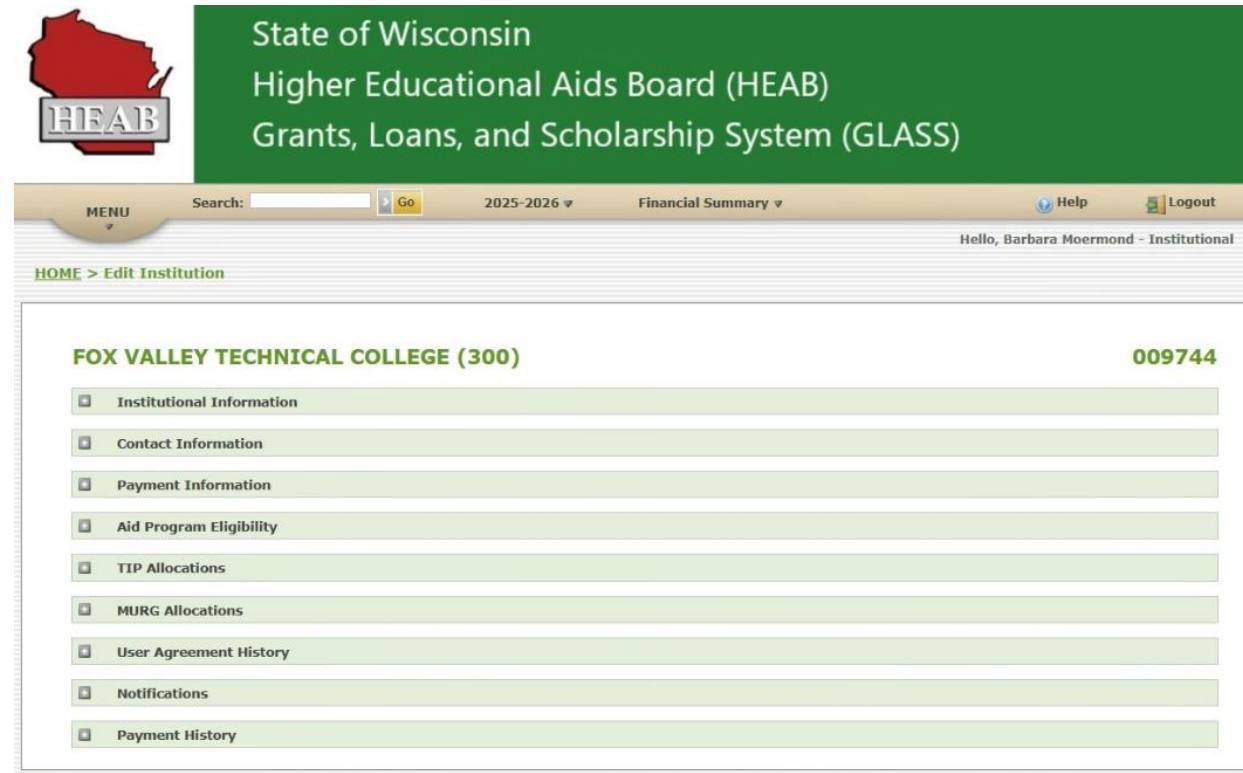
Edit Institution – Step 1

Go to home page then select ***Institution Information***.



Edit Institution – Step 2

Then select ***Institutional Information*** on the page that appears (see below).



The screenshot displays the HEAB GLASS web application interface. At the top, a green header bar contains the HEAB logo (a red outline of Wisconsin with 'HEAB' in a white box) and the text 'State of Wisconsin Higher Educational Aids Board (HEAB) Grants, Loans, and Scholarship System (GLASS)'. Below the header is a navigation bar with a 'MENU' button, a search field with a 'Go' button, and links for '2025-2026', 'Financial Summary', 'Help', and 'Logout'. A user greeting 'Hello, Barbara Moermond - Institutional' is visible on the right. The main content area shows a breadcrumb trail 'HOME > Edit Institution'. The institution name 'FOX VALLEY TECHNICAL COLLEGE (300)' and its ID '009744' are displayed. A list of nine menu items is shown, each with a small square icon and a label: 'Institutional Information', 'Contact Information', 'Payment Information', 'Aid Program Eligibility', 'TIP Allocations', 'MURG Allocations', 'User Agreement History', 'Notifications', and 'Payment History'. The 'Institutional Information' item is highlighted with a light green background.

Next Steps

- (2 min) **FAQs**
 - Prepared from questions received during meetings, received from emails and calls to HEAB office.
 - Shared on HEAB site.
- (2 min) **Upcoming Training/Q&A Sessions**
 - Refer to (link here) on HEAB GLASS resource site and watch for invitations.
- (1 min) **Feedback**
 - Please take the survey (via SurveyMonkey) which will be emailed to you soon after this meeting.
 - Please email HEAB with any questions. (HEABmail@wisconsin.gov)



Final Questions

MyWisconsinID:

Please refer to training guide
on the HEAB website

<https://heab.state.wi.us/files/glass>



GLASS Login:

Please refer to training guide
on the HEAB website

<https://heab.state.wi.us/files/glass>



Certification Process:

Please refer to training guide
on the HEAB website

<https://heab.state.wi.us/files/glass>

