

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 (UW, Tech, Tribal, PNP)
- B Training Topic 1: Access & IT Support
- D Training Topic 2: Financial Aid
- 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



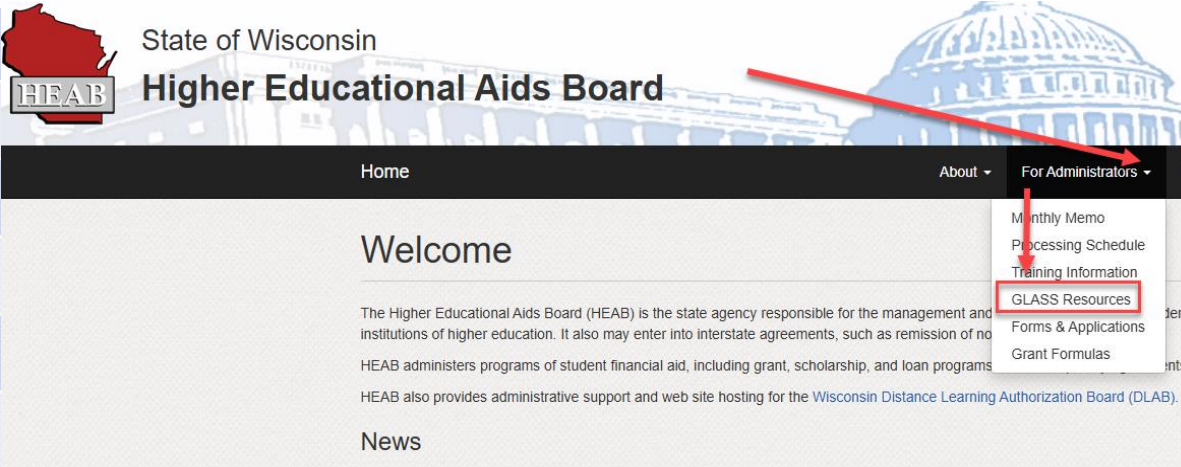
Timeline



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

Reference Item	Location *
Creating a MyWisconsinID	 <p>State of Wisconsin Higher Educational Aids Board</p> <p>Home About For Administrators For Applicants</p> <p>Welcome</p> <p>The Higher Educational Aids Board (HEAB) is the state agency responsible for the management and institutions of higher education. It also may enter into interstate agreements, such as remission of no HEAB administers programs of student financial aid, including grant, scholarship, and loan programs HEAB also provides administrative support and web site hosting for the Wisconsin Distance Learning Authorization Board (DLAB).</p> <p>News</p> <p>Monthly Memo Processing Schedule Training Information GLASS Resources Forms & Applications Grant Formulas</p>
Logging into Glass	
Grants Training Presentation	
Training Video(s) *	
FAQ *	
User Manual *	

* Updated on a regular basis. Please check back regularly for possible updates.

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



Environments

Environment	Availability	Purpose
Test / UAT	Now	This is a read only environment for schools to get familiar with GLASS before the Beta environment.
Beta	Refer to Timeline; Grants, Scholarships and Loans deployed into Beta on different dates.	This is an environment for schools to use full functionality on a daily basis before the production go-lives.



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 not recorded.
 - HEAB is working on a general recording for training which will be available on the HEAB site by mid-March.
 - HEAB will communicate when the general recording for training is available.



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.



Training Topic 1: IT Support

- Roster File Layouts



Training Topic 2: Financial Aid

- **Creating a User Profile**

- MyWisconsinID: Test vs Production (Refer to Addendum A)
- Log In (Refer to Addendum B)
 - Until Beta available (~3/31), please use/bookmark https://glass-test.wisconsin.gov/WI_Test/index.

- **Overview of GLASS**

- **Student Search**

- **Edit Student**

- **Certification Process**

- **Payment Requests**

- **Reports and Rosters**

- **Institution Information (incl Payment History Region)**



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) **School's To-Do's**
 - Create Wisconsin ID / Log into GLASS (if you haven't already; see addendum)
 - When beta ready (~3/31), please use GLASS at least a few times a week to do your work.
- (2 min) **Upcoming Meetings**
 - Come to mandatory scheduled meetings in April, May and June (2025). Attendance taken. Watch your inbox for an invite.
 - Please bring questions to the meetings.
- (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

Addendum A: MyWisconsinID



MyWisconsinID – Step 1



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

Welcome to GLASS!

Welcome to the GLASS system. GLASS is used by HEAB to administer grants, loans, and scholarships to Wisconsin students. FAOs at Wisconsin Colleges and Universities and High School Counselors may login to the system using a My Wisconsin ID.

Please [create a My Wisconsin ID](#) before attempting to login for the first time. Once you login with your My Wisconsin ID for the first time, HEAB will need to link up your account to an account in the GLASS system.

Click the Login button to get started!

> Login



MyWisconsinID – Steps 2 and 3



ENTER AN EMAIL ADDRESS FOR YOUR MyWisconsinID

MyWisconsin ID (UAT) Sign In

Email address

example - user@domain.com

! This field cannot be left blank

Next

[Unlock account?](#)

[Help](#)

Don't have an account? [Sign up](#)



Sign up

ENTER INTO THE FIELDS BELOW.

First name

Last name

Email

Use same email address as previous screen.

Sign Up

[Already have an account?](#)



MyWisconsinID – Steps 4 and 5



Set up security methods

Your email address from previous screen displayed here.

Security methods help protect your State of Wisconsin - (UAT) account by ensuring only you have access.

Preferably choose **Set up for Email below.**

Required now



Email

Verify with a link or code sent to your email
Used for recovery

[Set up](#)



Password

Choose a password for your account
Used for access

[Set up](#)

[Back to sign in](#)



Verify with your email

Your email address from previous screen displayed here.

We sent an email to **Your email address displayed here.**
Click the verification link in your email to continue or enter the code below.

[Enter a verification code instead](#)

Choose 
Enter a verification code instead

[Return to authentication](#) **New screen will appear to enter your phone number and a verification code will be sent to it.**
[Back to sign in](#)



MyWisconsinID – Steps 6 and 7



Set up security methods

Your email address from previous screen displayed here.

Security methods help protect your State of Wisconsin - (UAT) account by ensuring only you have access.

Required now



Password

Choose a password for your account
Used for access

[Set up](#)

Setup a password for your MyWisconsinID.

[Back to sign in](#)



Set up password

Your email address from previous screen displayed here.

Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Password can't be the same as your last 24 passwords
- At least 2 hour(s) must have elapsed since you last changed your password

Enter a password meeting these requirements.

Enter password

Re-enter password

Next

[Return to authenticator list](#)

[Back to sign in](#)



MyWisconsinID – Steps 8 and 9



Set up security methods
Your email address from
previous screen displayed here.

Security methods help protect your State of Wisconsin - (UAT) account by ensuring only you have access.

Required now



Google Authenticator

Enter a temporary code generated from the Google Authenticator app. Used for access

[Set up](#)



Okta Verify

Okta Verify is an authenticator app, installed on your phone or computer, used to prove your identity. Used for access

[Set up](#)



Phone

Verify with a code sent to your phone. Used for access

[Set up](#)



Security Key or Biometric Authenticator

Use a security key or a biometric authenticator to sign in. Used for access

[Set up](#)

Preferably choose your mobile phone number.



Set up phone authentication

Your email address from
previous screen displayed here.

Enter your phone number to receive a verification code via SMS.

Country/region

United States

Phone number

+1

Preferably choose your mobile phone number.

This field cannot be left blank

Receive a code via SMS



[Return to authenticator list](#)

[Back to sign in](#)



MyWisconsinID – Step 10



Set up phone authentication

aaron.d.kohlmeier@gmail.com

A code was sent to your phone. Enter the code below to verify.
Carrier messaging charges may apply

Enter Code

Enter the code sent to phone number entered in prior screen.

Verify

[Return to authenticator list](#)

[Back to sign in](#) **Click on verify and you are setup.**



Addendum B: GLASS Login



GLASS Login – Step 1



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

Welcome to GLASS!

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Please [create a My Wisconsin ID](#) before attempting to login for the first time. Once you login with your My Wisconsin ID for the first time, HEAB will need to link up your account to an account in the GLASS system.

Click the Login button to get started!

> Login



CLICK HERE TO BEGIN LOGIN



GLASS Login – Steps 2 and 3



Sign in to GLASS

CHOOSE My Wisconsin ID (Test)

Institution, High School Counselor, and WEOP Counselor Users use My Wisconsin ID.



My Wisconsin ID (Test)

HEAB Staff

GBPI Staff



ENTER your email address

MyWisconsin ID (UAT) Sign In

Email address

example - user@domain.com



! This field cannot be left blank

Next

[Unlock account?](#)

[Help](#)

Don't have an account? [Sign up](#)



GLASS Login – Steps 4 and 5



Verify with your password

ENTER Your Password

Password

Verify

[Forgot password?](#)

[Back to sign in](#)



Verify with your phone

DISPLAYS your email address here

Send a code via SMS to

DISPLAYS your phone # here

Carrier messaging charges may apply


Receive a code via SMS

[Back to sign in](#)


CLICK Here




GLASS Login – Steps 6 and 7

 WISCONSIN

ENTER code sent as text to your phone



Verify with your phone


 dennis.h.kohlmeier@gmail.com

A code was sent to +1 XXX-XXX-2720. Enter the code below to verify.

Carrier messaging charges may apply

Enter Code

[Back to sign in](#)

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

MENU Search: Go 2024-2025 Financial Summary Help Logout

Hello, Dennis Kohlmeier - Institutional

- Institution**
 - Institution Information
- Students**
 - Search For Student
 - Rosters
- Reports**
 - Standard Reports
- Documents**
 - Application Entry
 - Incomplete Applications
- Payments**
 - Request Payment
- Data File Transfer**
 - Send Roster File
 - File Transfer Results
- Options**
 - Manage Users
 - Edit Your Profile

