

Mastering the ONE-key - Part I

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Hosted by: Lori Russell, Manager Client Services at Ryerson University

Date: Wednesday, November 18



Agenda

Introductions

- Snapshot of new Loan Five webinar series
- Meet your presenter

Student Inquiries and Advising

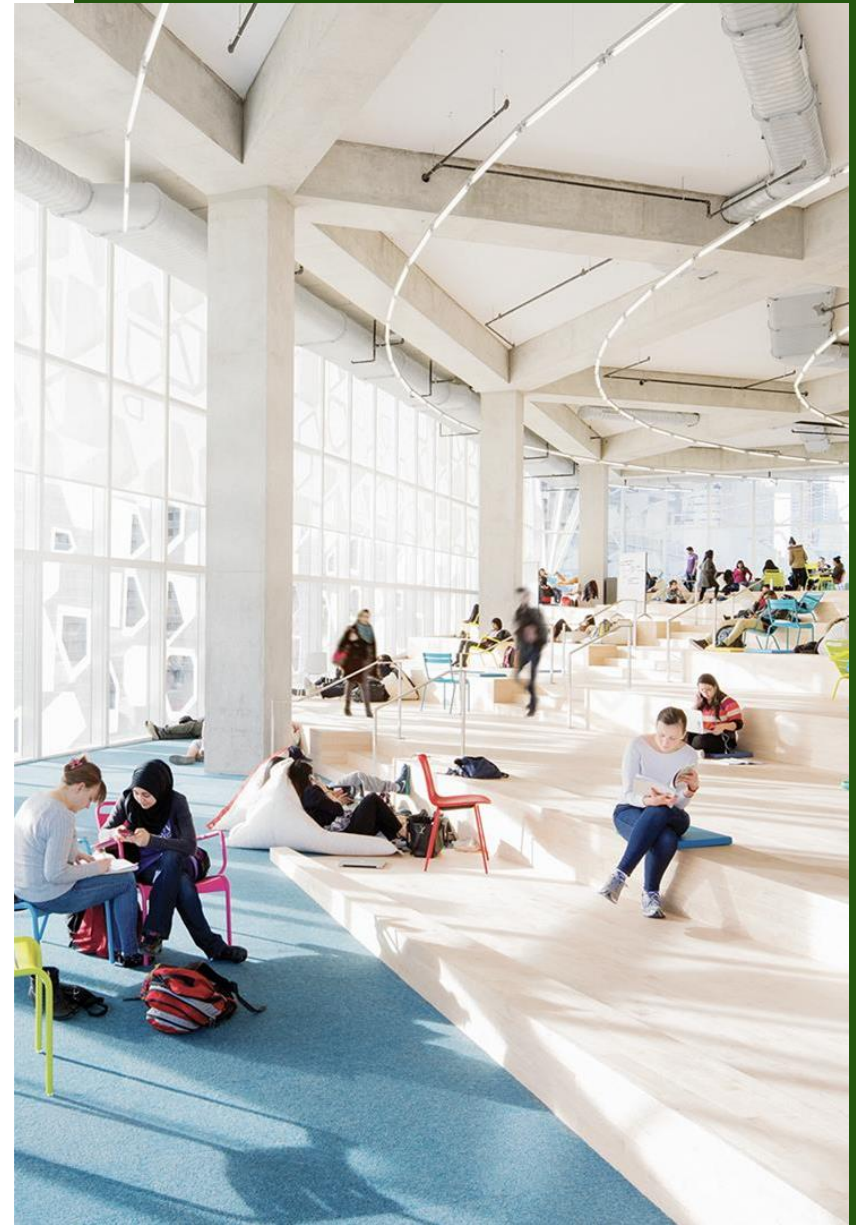
- What is our role?
- OSAP Policy Manuals
- Ministry Forms
- View Student FAO Inquiry

Communications

- Application Communications
- Profile Communications
- Application Comments
- Profile Comments/AS400 Comments

ONE-Key Portal Onboarding

- OSAP Processing Manuals
- Left Navigation Menus
- Top Navigation Menus
- “Look to the right!”



“Loan Five:” Webinar Series

The new “Loan Five” webinar series is a just in time collection of training, resources, and panels for the OASFAA membership to foster ongoing learning and development.

Three session types:

- OSAP 101: Catered to newer financial aid staff
- Dive Deep: Digging deep into specific parts of OSAP
- General Sessions

Sessions will be recorded and posted onto the OASFAA website.

Upcoming sessions:

- **December 9th:** Dive Deep: Appeals & Reviews
- Our winter series will be announced soon!



Introduction

Je m'appelle Jessica!

12 years in financial aid at
Glendon campus' SFS office

- Student Accounts
- Financial Aid
- Campus/Faculty

Proud York alumna (BA '06)

Traits:

- Inquisitive
- Analytical
- Creative
- Enthusiastic
- Caring



Glossary

Application Types:

- **CIFS:** Continuation of interest-free status, for previous full-time OSAP loans
- **FT:** Full-time
- **PT:** Part-time
- **Base / BAS / B / Core:** An application that is submitted by a student on the OSAP website.
- **Reinstatement / RST / 2 / Study Period 2:** Extension entered by an FAA to add additional term(s) to a completed application within the same academic year

Document Types:

- **Required:** documents needed to verify details and complete a profile/application
- **Review / Appeal:** submitted to request an exception to a standard policy and reassess eligibility for financial aid
- **Supporting:** documents needed to make *most* changes to profile/application details

FAA / FAO: Financial Aid Administrator / Financial Aid Office

MTCU / the Ministry:

- **ICU:** Inspection and Compliance Unit
- **SFAB:** Student Financial Assistance Branch

OAN: OSAP Access Number (9 digits)



Student Inquiries and Advising



What is the role of the FAO?

- First point of contact for students studying in ON
- Assist students in sorting out:
 - Status of account
 - Profile
 - Applications
 - What has been communicated
 - Next steps / actions to take



Resources (from the Ministry)

- Policy Manuals (“what”)
- Procedure Manuals (“how”)
- View FAO Student Inquiry
- Comments (Application, Profile, AS400)
- Communications (MTCU, FAO)



Policy Manuals

Finding the OSAP policy manuals

- ONE-Key portal
 - OSAP FAO Information Portal
 - Manual and Guidelines Search

Filter Manuals and Guidelines

- Year
- Category

Results

- Policy Manuals typically fall under the Assessment OR Eligibility categories
- Most have “policy manual” in the title (but not all!)

A vertical navigation menu with a dark green background. The menu items are: Administrative References (with a right arrow), Manual, Form & Other Search (with a down arrow), Forms Search (with a right arrow), Funding Instrument Search (with a right arrow), Manual and Guidelines Search (with a right arrow), Topic Search (with a right arrow), Contacts (with a right arrow), OASFAA Information (with a right arrow), News (with a right arrow), and Help (with a right arrow).

Search	
Forms	Go >
Manuals and Processing Guidelines	Go >
Topics	Go >
Funding Instruments	Go >

Policy Manuals

OSAP Full-time Policy Manual

Manuel du RAFFEO pour étudiantes
et étudiants à temps plein

OSAP for Part-Time Students:
Policy Manual

Continuation of Interest-Free
Status (CIFS) Policy Manual



More Manuals...

BSWD/CSG-PDSE Policy Manual

Bursary Recording System (BRS) Manual

Indigenous Student Bursary Program Guidelines

Ontario First Generation Bursary Program Guidelines

Ontario Indigenous Travel Grant Guide

Student Access Guarantee (SAG) Policy Manual

What is in the policy manuals?

These manuals provide the framework to confirm a student's eligibility for financial aid and the assessment of funding they can receive.

- Policies and exceptions
- Instructions and procedures
- Scenarios, samples

How do I use it?

- To clarify the OSAP program mandate and its requirements
- To clarify how students can correct errors and declare changes
- To clarify options to students requesting a review



What is NOT in the policy manuals?

- Full details on what documents that can be accepted
 - Each year more content is added
- How to process (most) things
 - Referrals are made to processing manuals

Where else do I look for information?

- Ministry / FAO forms
- View FAO Student Inquiry in ONE-Key portal



Ministry Forms

Finding Ministry Forms

- ONE-Key portal
 - OSAP FAO information portal
 - Forms Search

Filter Forms

Year:	2020-2021	Reset>
Category:	Select a Category	
FI Package:	Select FI Package	
FI:	Select FI	

Search by Form Name

Go >

Filter

- Year
- Category

Results

- Forms fall under the administrative, application or processing categories.

Results			
Document Name:	Year:	Category:	Action:
2008-2009 Request for Assessment on Parent's Estimated Income	2008-2009	Processing	View English > View French > Details >
2008-2009 Request for Assessment on Spouse's Estimated Income	2008-2009	Processing	View English > View French > Details >
2009-2010 Request for Assessment on Parent's Estimated Income	2009-2010	Processing	View English > View French > Details >
2009-2010 Request for Assessment on Spouse's Estimated Income	2009-2010	Processing	View English > View French > Details >
OSAP Application Update: Request to Use Parent's Estimated Income (2019-20)	2019-2020	Application	View English > View French > Details >
OSAP Application Update: Request to Use Parent's	2020-2021	Application	View English >

Ministry Forms



Are you looking for an OSAP form? Select from the alphabetical list below or search by form name or keyword. To view and print these forms you will need a PDF viewer such as [Adobe Acrobat Reader](#).

Academic Year:

[2020-21](#)

[2019-20](#)

Search by Form Name:

Search

Search by Keyword:

Search

Forms available publicly on the OSAP website

- Can link to these forms in FAA Communications

2020-21 Search Results

Listed below are all the forms for the 2020-21 academic year. Use these forms if your program starts anytime between August 1, 2020 to July 31, 2021.

Displaying 1-5 of 5

[OSAP Application Update: Parental Information \(2020-21\)](#)

Use this form if you have been advised by your financial aid office that information from your parents is required for your submitted OSAP Application for Full-Time Students to be considered.

Ministry Forms

View FAO Student Inquiry:
Click on “Print/upload”

Student Profile			
Student Profile contains: Basic Personal Information (name, date of birth and gender), Email Address and Correspondence Options, Addresses, Release of Information to Others, and Additional Information			View Profile Details >
OSAP for Full-Time Students			
School Information	Application Status:	Account:	Action:
EUBB YORK UNIVERSITY Glendon: Linguistics & Language Studies (BA) Sep 17/20 - Apr 28/21	Sep 16/20: Your application has processed. Check the status for the latest information.	20523876	Check status > Print/upload > Close > FAO Links: View estimate audit >

Description:

Provide documentation about your academic progress. It's required before you can get your money.

▶ [Acceptable documents](#)

Open and print your form:

Use the form password below to open your form in Adobe Reader.

[How to open and print your forms](#) 

Open form

Form password: xV4P7dNe

▶ Trouble using this password? [Get a new one.](#)

Provide your form:

Upload or submit to your financial aid office.

▶ [Financial aid office address](#)

Upload form

Forms provided to students are personalised

- Less pages than the versions posted publicly
- Only available through this inquiry in English

FAO Student Inquiry

Application(s)		
CIFS ▾		
	2018-2019	WORK WITH >
	2016-2017	WORK WITH >
CoreFT ▾		
	2020-2021	WORK WITH > VIEW FAO STUDENT INQUIRY >
	2019-2020	WORK WITH > VIEW FAO STUDENT INQUIRY >
	2018-2019	WORK WITH > VIEW FAO STUDENT INQUIRY >
	2017-2018	WORK WITH > VIEW FAO STUDENT INQUIRY >
	2016-2017	WORK WITH >
	2015-2016	LOB ONLY
	2014-2015	LOB ONLY
	2013-2014	LOB ONLY
OTG ▾		
	2016-2017	LOB ONLY
	2015-2016	LOB ONLY
	2014-2015	LOB ONLY
OSOG ▾		
	2016-2017	LOB ONLY
	2015-2016	LOB ONLY
	2014-2015	LOB ONLY
	2013-2014	LOB ONLY

FAO Student Inquiry

Student Profile			
Student Profile contains: Basic Personal Information (name, date of birth and gender), Email Address and Correspondence Options, Addresses, Release of Information to Others, and Additional Information			View Profile Details >
OSAP for Full-Time Students			
School Information	Application Status:	Account:	Action:
EUBB YORK UNIVERSITY Glendon: Political Science (BA) Jan 11/21 - Apr 28/21	Sep 1/20: Your application has processed. Check the status for the latest information.	20464578	Check status > Print/upload > Close >

[Message centre](#)

10

[OSAP account](#) v

[OSAP apps](#) v

[App status](#) v

[Help/contact](#)

[Log out](#)



2020-21 Full-time application

Status of your application

Taking a Deeper Dive



What documents do I need to provide... to complete my OSAP application?

Description	View FAO Student Inquiry	Manuals	Forms
Proof of child's date of birth	Instructions provided to student (Print/Upload)	<p>Policy Manual: Valid documents to provide (including alternatives)</p> <p>Processing Manual: How to process document and update application</p>	No forms
Proof of foreign/non-taxable income	Instructions and form provided to student (Print/Upload)	<p>Policy Manual: How income is verified Reviews</p> <p>Processing Manual: Document type for upload</p>	Ministry forms

What documents do I need to provide... to change (or update) my application?

Description	View FAO Student Inquiry	Manuals	Forms
Change in residency	Instructions provided to student (Print/Upload)	<p>Policy Manual: Valid documents to provide Changes in answer to residency question Scenarios Processing notes</p> <p>Processing Manual: Documents generated, app view Document type for upload</p>	Ministry forms
Change in reported assets	Option provided to upload a change/appeal to application (Print/Upload)	<p>Policy Manual: Policy on assets as a resource Reviews for assets</p> <p>Processing Manual: How to process an adjustment to reported assets</p>	No forms

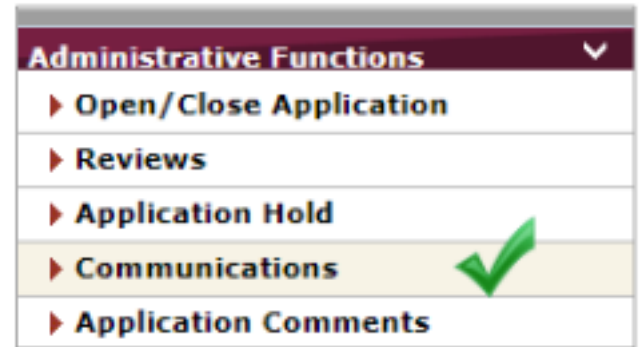
What documents do I need to provide... to submit an appeal?

Description	View FAO Student Inquiry	Manuals	Forms
Remove an academic progress probation or restriction	Message Centre	Policy Manual: Eligibility Reviews Procedures (extensive!) Processing Manual: Status updates, portal layouts Mass upload of decisions Document type for upload	Ministry forms, other documentation

Communications



Application Communications



What messages have been sent by the Ministry OR the FAO to the student?

- View the communication item in the format it was generated
- Request a re-print of any communication generated
- Go to view Profile Communications

		VIEW STUDENT COMMUNICATIONS >	REQUEST COMMUNICATION >	VIEW AUDIT >	
Application Communication History					
Communication:	Date Requested:	Date Sent:	Format:	Status:	Actions:
FAA/FAO Information Request	Oct 26/2020	Oct 27/2020	Message Centre	Sent	View >
Required Documents	Aug 8/2020	Aug 8/2020	Message Centre	Sent	View >
Welcome Notice	Aug 8/2020	Aug 8/2020	Message Centre	Sent	View >



Student Communications

Less commonly used, located in the Student Profile

Example: Failed SIR check

AS400 LETTER HISTORY >				VIEW AUDIT >	
Student Communications History					
Communication:	Date Requested:	Date Sent:	Format:	Status:	Actions:
SIR Check Fail	Sep 12/2018	Sep 12/2018	Message Centre	Sent	View >



Student Profile Comments

- Academic Progress Information Exists
- **BRS Exists**
- **Important Profile Comments Exist**
- **OTG/OSG-Base Terms**

Application(s)	
CoreFT ▾	
2020-2021	WORK WITH > VIEW FAO STUDENT INQUIRY >
2019-2020	WORK WITH > VIEW FAO STUDENT INQUIRY >
2018-2019	WORK WITH > VIEW FAO STUDENT INQUIRY >




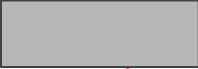
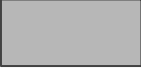
Profile & AS400 Comments

< Expand All > < Collapse All >

[ADD COMMENT >](#)

[VIEW AS400 COMMENTS >](#)

Student Profile Comments

Date/Time:	Topic:	Subject:	User:	Actions:
Sep 29/2020 03:55 PM	General	Code 36 downgraded based on 19-20 results.	 (EUBB)	VIEW >
Oct 10/2018 02:14 PM	General	OLD SIN 1718 937 039 246		VIEW >
Sep 21/2018 10:14 AM	General	Name updated as per letter from student, copy of new SIN and existing document	 (EUBB)	VIEW >



Providing Clarity on Processing

What is the status of...?

- Documents, reviews submitted
- Eligibility & assessment decisions
- Distribution of funding
- Changes to OSAP eligibility
- Timelines, important dates and deadlines

How best to use the ONe-Key portal:

- Establish timeline of events
- Confirm who is working on the file
- Share communications in a place that other FAAs can access
- Keep records, communications files in the student's OSAP account



ONe-Key Portal Onboarding



Processing Manuals

Finding the OSAP processing manuals

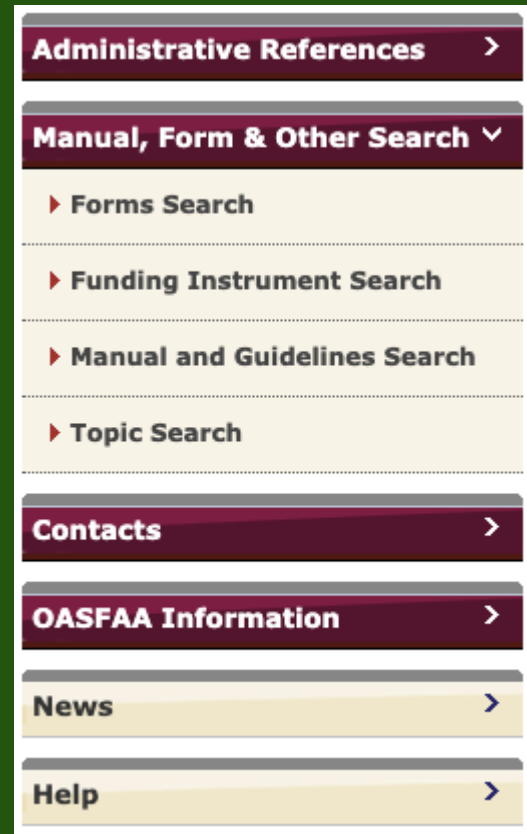
- ONE-Key portal
 - OSAP FAO Information Portal
 - Manual and Guidelines Search

Filter Manuals and Guidelines

- Year
- Category

Results

- Manuals fall under the processing category
- Referred to as processing guide, system guide, user guide, update guide



Search	
Forms	Go >
Manuals and Processing Guidelines	Go >
Topics	Go >
Funding Instruments	Go >

Processing Manuals

OSAP Full-Time Administrative Portal:
Systems Guide

OSAP Part-Time Administrative Portal:
Systems Guide

Continuation of Interest-Free Status
(CIFS) Administrative Portal User Guide

Profile (Student Inquiry): Systems Guide

Image Administrative Portal Guide

- Year = 2019-2020

Processing Summary - 2020-2021

Student SIN: <input type="text"/>	Student No: 123456	Action:
Name (Last, First): <input type="text"/>		VIEW STUDENT PROFILE > VIEW STUDENT SUMMARY > VIEW ALL CORE-FT APPLICATIONS >
Account Number: <input type="text"/>		
Master status: Open		
Processing status: Third Party pre-requisite		
Institution: EUAL - LAKEHEAD UNIVERSITY		
Study Period(s): May 5, 2021 - August 25, 2021 (16 weeks)		
Student Status: Single Independent		

• Permanent Disability
• Review(s) Exist

• Application Comments exist

[RE-RUN EVENTS >](#) [SHOW ALL >](#) [VIEW AUDIT >](#)

Processing Step:	Description:	Date:	Status:	Action:
1	Requirements for Assessment	Oct 1, 2020	Incomplete	DETAILS ▾
	Supporting Documentation Preventing Third Party	Oct 1, 2020	Incomplete	VIEW >
	Program Cost	Oct 1, 2020	Incomplete	VIEW >

osap 2020-21 Full-time application

Status of your application

LAKEHEAD UNIVERSITY - Bach Science/Hon Bach Science - Orillia
Sep 8/20 - Apr 20/21

[Go to Current status](#) [Go to Next steps](#) [Go to What's done](#)

! Current status of your application

Status as of Sep 23/20

Your funding can't be released because documentation is required.

Deadline dates to consider [□]

[Go to a list of your documents](#)

Additional information

[Assistance for students with disabilities [□]](#)
[First Generation Bursary and Indigenous Student Bursary [□]](#)

There's More!

OSAP Administrative System Guides:

- OSAP Data Files and Reports
- Confirmation of Enrolment (COE) File Upload and Download
- OSAP for FT Students COE Work Queue (Fixed Cost)

OSAP Part-Time Administrative Portal: Work Queues

Bursary Recording System (BRS):

- Processing Guide
- Processing Guide for Recording OGS and QEII-GSST Award Information (20-21)
- Mass Upload Instructions and Requirements for Participating Institutions



... We're Not Done!

Cost Code Update Guide

OSAP Data File Administrative Portal: Systems Guide

OSAP Net Tuition Guide: Net Cost View

OSAP Records Management Guide: Storage of OSAP Documents

- Year = 2019-2020

Records Management Guideline: OSAP Record Retention and Archiving

- Year = 2019-2020

Academic Progress Upload Guide

- Year = not applicable

Administrative Portal System Guides

The Left Navigation Bar

From within a student's application, use the left navigation bar to access the various **OSAP PT Administrative Portal** functions:



FT & PT Admin Portals

- Show you **how** to understand the screens you are navigating!

Administrative Portal System Guides

FT & PT Admin Portal

- Example: Funding Reassessments

Changes between the prior and current assessments are flagged in **Assessment – Current Entitlement**. The changes are reflected on both the total and any funding instruments impacted:

- Any increases are shown in green text.

Total	Loans	Federal Grants	Provincial Grants	Date/Time	Actions
\$6300 (+4500)	Fed:\$2700 (+2700)	CSG-PD: \$0 CSG-PT: \$3600 (+1800) CSG-Dep: \$0	OPTG: \$0	Oct. 15, 2020 12:47 PM	DETAILS > ELIGIBILITY >

- Any decreases are shown in red text.

Total	Loans	Federal Grants	Provincial Grants	Date/Time	Actions
\$5300 (-1000)	Fed:\$1700 (-1000)	CSG-PD: \$0 CSG-PT: \$3600 CSG-Dep: \$0	OPTG: \$0	Oct. 15, 2020 12:47 PM	DETAILS > ELIGIBILITY >

Administrative Portal System Guides

FT & PT Admin Portal

- How are supporting documents generated? Sample: Explanation of financial situation


Code	Description	Reason Supporting Document is Generated	Eligible for Carry-Forward?
060	Proof of line 15000 income: Student	Requirement for all applications	Yes – between academic years
064	Proof of line 15000 income: Spouse	Set if student status = common-law or married AND spouse has valid SIN	Yes – between academic years
068	Explanation of financial situation 	Scenario 1: - Student status = single or sole-support parent AND - student 15000 income = zero Scenario 2: - student status = common-law or married AND - student 15000 income = zero AND - spouse 150 income = zero AND	Yes – between academic years

Image Admin Portal

How to track the processing of uploaded documents:

- Helpful if the student is asking what more they need to provide.
- May clarify where to look in the student's application:
 - Reviewed-Info? Check for an FAA Communication that was sent to the student
- *View audit* of a processed document:
 - View Details
 - Edit
 - View Audit (top right)

Status	Description
New	The document is "new" to the work queue and has not been actioned by the FAA. This is the initial work queue status for all documents needing to be reviewed/worked by the FAA.
Completed	The document has been reviewed and completed.
Accepted	The document has been reviewed and accepted for processing.
Denied	The document has been reviewed and completed (in this situation, the information was not accepted for processing).
Reviewed-Info	The document has been reviewed by the FAA. The FAA has determined that additional information is required in order to complete requested updates to the OSAP application.
Pended - Under Review	The document is currently being reviewed by a staff member.
Not Required	The document is not required, and no further action is required by the FAA. This may be a duplicate document that has been actioned by the FAA already or a similar scenario where the document is not required to support the application processing.

Image Admin Portal

Who is processing the document?

- FAO - processing timeline, communication with student
- Ministry - processing timeline, communication with FAO/student

FAA Authority Document Types for 2019-20	
Document Type	Document Description
FAOACAPR	Academic Progress Review - FAO
FAOFAMBD	Family Breakdown Review - FAO Review
FAOSUP1	OSAP Supporting Document - Group 1
FAOSUP2	OSAP Supporting Document - Group 2
FAPROFIL	Student Profile Documentation - FAO Review
FAUPDATE	OSAP Application Update Request
FAREVIEW	OSAP Review Request
FACIFS	CIFS Request for FAO Review
PTFACAPR	Academic Progress Review-Part Time - FAO
PTFAREV	OSAP Part Time Review Request - FAO
PTCOE	Part-Time Confirmation of Enrolment
PTCSLSUP	OSAP Part Time Supporting Documents
SIGPAGE	Signature Pages


Ministry Authority Document Types for 2019-20	
Document Type	Document Description
ACAPROVF	Academic Progress Appeal - Verification
APPEALFB	Family Breakdown Review
APPEALS	Appeal Documentation
CLRDEC	Clearance Documentation
ECPR	Exceptional Circumstances Priority Review
ECR	Exceptional Circumstances Review
OSAPSUPP	OSAP Application: Supporting Documentation

Quick Tips on Navigating the ONe-Key Portal



Left Navigation Menus

FT OSAP, PT OSAP, CIFS

- Application Inquiry** ▾
 - ▶ Search for an application
 - ▶ Recently Accessed
 - OSAP FT Functions** ▾
 - ▶ Enter Application
 - ▶ Work Queues
 - ▶ Upload and Download
 - ▶ Student Access Guarantee
 - References** ▾
 - ▶ OSAP FT Portal Systems Guide
 - Help**
- 

NOTE: Application Inquiry is NOT Student Inquiry

Student Profile

- Work With Student Profile** ▾
 - ▶ Student Summary
 - ▶ Student Profile Details
 - ▶ Profile Documentation
 - ▶ SIR Check Details
 - ▶ OEN Check Details
 - ▶ Student Restrictions
 - ▶ Academic Progress
 - ▶ Bursary Recording
- Administrative Functions** ▾
 - ▶ Student Communications
 - ▶ Enter Application
 - ▶ Reset Password
 - ▶ Student Profile Comments
 - ▶ Student Hold
- Student Inquiry** ▾
 - ▶ Search for a Student
 - ▶ Recently Accessed

Top Navigation Menus

Distribution

[ALL DETAILS >](#)[COE HISTORY >](#)[TRM/REPAYMENT >](#)

Application Details

[VIEW ESTIMATE >](#)[VIEW AUDIT >](#)

Student Restrictions

[VIEW AS400 HISTORY >](#)[VIEW AUDIT >](#)

LOOK TO THE RIGHT (Before you click “FAO Home”)

You clicked to view a student’s application

From here:

- Go to the student’s profile
- Go back to the student’s summary page

Action:
VIEW STUDENT PROFILE >
VIEW STUDENT SUMMARY >
VIEW SAG >
VIEW ALL CORE-FT APPLICATIONS >

LOOK TO THE RIGHT (Before you click “FAO Home”)

Work With Student Profile ▼
▶ Student Summary
▶ Student Profile Details
▶ Profile Documentation
▶ SIR Check Details
▶ OEN Check Details
▶ Student Restrictions
▶ Academic Progress
▶ Bursary Recording
Administrative Functions ▼
▶ Student Communications
▶ Enter Application
▶ Reset Password
▶ Student Profile Comments
▶ Student Hold
Student Inquiry ▼
▶ Search for a Student
▶ Recently Accessed
References ▼

Student Summary				
Student Information				Action:
Name:				RETURN TO APPLICATION >
SIN:				
OAN:				
OEN:				
				< Expand All > < Collapse All >
				ADD COMMENT >
Student Profile Comments				
Date/Time:	Topic:	Subject:	User:	Actions:

You clicked to view **application comments** in a student's application, and then clicked to see **profile comments**...

From here:

- Can you go back to the application?
- Can you go back to the same student's summary screen?
- Can you look up another student?

Thank you for joining us!

