

# State Need Grant Repayment Referrals

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## Basic Steps

1. Log on to the HECB Portal
2. Input student SSNs
3. Enter student data and refer student to HECB

## Step 1: Log on to the HECB Portal

Access the HECB Portal at <https://fortress.wa.gov/hecb/portal>.

Your user name is your email address. If you do not know your password, please contact SNG staff.

From the menu on the left, click on:

-Student Receivables

## Step 2: Input Student SSNs

Use the search tab to access a student individually, or use the Web Entry tab to enter multiple SSNs.

The **Search tab** allows you to either search by SSN or by name. Type the information either in the SSN box, or in the name boxes. Click Search.

The screenshot shows a web interface titled "Online Receivable Transmittal". At the top, there are two tabs: "Search" (highlighted in pink) and "Web Entry" (highlighted in blue). Below the tabs, there is a link that says "Use Status and Referral Date Instead of SSN". Underneath, there are three input fields: "SSN" followed by a text box, "or" followed by "Last Name" followed by a text box, and "First Name" followed by a text box. At the bottom left of this section, there is a blue "Search" button. A black arrow points from the text above to this "Search" button.

Use the **web entry tab** to enter multiple SSNs, separated by commas or spaces or you can enter each SSN on a new line, as shown below. After all SSNs are entered, click Search.

Online Receivable Transmittal

**Search** **Web Entry**

Enter SSNs, separated by commas or spaces or enter each SSN on a new line:

123456789  
987654321  
999999999

**Search**

See next page for further instructions.

### Step 3: Enter Student Data and Refer Student

Entry boxes will appear for each student you entered an SSN for. The address and telephone information will populate from the address listed on the student's FAFSA. Please change the information if you have a better address or phone number.

The screenshot shows a web form with three student entries. The first entry is active and has arrows pointing to its address fields. The second and third entries are greyed out. Each entry includes a Name field, an Academic Year and Institution dropdown, a Permanent Address field, a Mailing Address field, and a Home Phone field. The first entry has a Search button above it.

Name: 987-65-4321 Doe, Q		Academic Year 2011-2012	Institution [dropdown]	Save
Permanent Address: 5555 ANY PLACE SOMEWHERE WA 55555		Cancel		
Mailing Address: [fields]				
Home Phone: 206 555 5555				

  

Name: 123-45-6789 Duck, Daffy		Academic Year 2011-2012	Institution [dropdown]	Save
Permanent Address: [fields]		Cancel		
Mailing Address: [fields]				
Home Phone: 832 259 8756				

  

Name: 999-99-9999 Salerno, Alicia		Academic Year 2011-2012	Institution [dropdown]	Save
Permanent Address: 8427 MILWAUKEE ST FORT LEWIS WA 98433		Cancel		
Mailing Address: [fields]				

Select Academic Year and Institution from the drop down boxes.

The screenshot shows the same web form as above, but with the third student entry active. Arrows point to the Academic Year, Institution, Term, and Status dropdowns. The Home Phone field is also visible.

Name: 999-99-9999 Salerno, Alicia		Academic Year 2011-2012	Institution Seattle University	Save
Permanent Address: 8427 MILWAUKEE ST FORT LEWIS WA 98433		Term Summer 1	Status [dropdown]	Cancel
Mailing Address: [fields]				
Home Phone: 000 000 0000				

Then select the Term and the Status of the receivable. See the next page for status choices.

**STATUS CHOICES:**

In Repayment – Selecting this status replaces the function of sending a paper transmittal to HECB. Select this status to refer an account to HECB for billing. Once the In Repayment status is selected, you are prompted to fill in the original award amount, the amount you are referring for repayment, the date you notified the student in writing, and the reason for repayment. Then, click Save. Once clicking save, the box disappears.

Name: 999-99-9999 <b>Salerno, Alicia</b>	Academic Year Institution 2011-2012 ▾ Seattle University ▾	<input type="button" value="Save"/>  <input type="button" value="Cancel"/>
Permanent Address: 8427 MILWAUKEE ST FORT LEWIS WA ▾ 98433	Term Status Winter ▾ In Repayment ▾	
Mailing Address: [ ] [ ] ▾ [ ]	Award Amount Referral Amount Date Student Was Notified [ ] [ ] [ ]	
Home Phone: 000 [ ] 000 [ ] 0000 [ ]	Reason for repayment [ ]	

Institution to Bill – Selecting this status replaces the function of marking students as in repayment on the SNG interim report. Submitting a student as an Institution to Bill status flags the student on the SNG archive as being in repayment. However, by selecting this status you are only notifying HECB that the student owes, and that your campus is attempting to collect. Once you've selected year, school, term, and status, click Save.

Name: 987-65-4321 <b>Doe, Q</b>	Academic Year Institution 2011-2012 ▾ Grays Harbor College ▾	<input type="button" value="Save"/>  <input type="button" value="Cancel"/>
Permanent Address: 5555 ANY PLACE SOMEWHERE WA ▾ 55555	Term Status Fall ▾ <b>Institution to Bill</b> Sent to Collection Agency Uncollectable Suspended - Disabled / Unemployable Deceased Obligation Cancelled Paid in Full Balance Written Off	
Mailing Address: [ ] [ ] ▾ [ ]		
Home Phone: 206 [ ] 555 [ ] 5555 [ ]		
Name: 123-45-6789 <b>Duek, Daffy</b>	Academic Year Institution 2011-2012 ▾ [ ] ▾	<input type="button" value="Save"/>  <input type="button" value="Cancel"/>
Permanent Address: [ ] [ ] ▾ [ ]		
Mailing Address: [ ] [ ] ▾ [ ]		
Home Phone: 632 [ ] 259 [ ] 6756 [ ]		
Name: 999-99-9999 <b>Salerno, Alicia</b>	Academic Year Institution 2011-2012 ▾ [ ] ▾	<input type="button" value="Save"/>  <input type="button" value="Cancel"/>
Permanent Address: 8427 MILWAUKEE ST FORT LEWIS WA ▾ 98433		

If the student has been submitted as in Institution to Bill and does not pay, you need to look up the student on the search tabs, change their record to the In Repayment status, and enter the additional referral information to refer the account to HECB for collection.

If the student does pay at your campus, you need to delete the account. If you do not delete the account once the student pays their debt, they will remain on the SNG archive.

**To delete an Institution to Bill account:**

Select the Student Receivables Portal menu item.

Use either the Search tab or the Web Entry tab to find the record you want to delete.

The screenshot shows a web interface with two main sections. The top section is a search form with two tabs: 'Search' (highlighted in pink) and 'Web Entry'. Below the tabs is a link that says 'Use Status and Referral Date Instead of SSN'. There are three input fields: 'SSN' with the value '987654321', 'Last Name', and 'First Name'. A 'Search' button is located below these fields. The bottom section is a record edit form. It is divided into several sections. The top left section is labeled 'Name:' and contains the SSN '987-65-4321' and the name 'Doe, Q'. The top right section is labeled 'Academic Year' and 'Institution', with dropdown menus showing '2011-2012' and 'Centralia College'. The middle left section is labeled 'Permanent Address:' and contains fields for '5555 ANY PLACE', 'SOMEWHERE', 'WA', and '55555'. The middle right section is labeled 'Term' and 'Status', with dropdown menus showing 'Summer 1' and 'Institution To Bill'. The bottom left section is labeled 'Mailing Address:' and 'Home Phone:', with fields for '206', '555', and '5555'. On the right side of the record edit form, there are three buttons: 'Save', 'Cancel', and 'admin'. A 'Delete this Record' button is located in the middle right section, and an arrow points to it from the text below.

Click the Delete this Record button. Once you delete the record, changes are reflected on the archive the next day.

**To delete an account that has been referred for repayment:**

Contact HECB staff.