Online Scholarship Application Training Guide

Included in this document are the detailed steps required for colleges and departments to create and manage online scholarship applications for students.

This document includes training on:
- Online Scholarship Application Access
- Assigning Administrative Roles for Staff
- Creating New Scholarship Applications
- Creating/Editing Application Instructions
- Creating/Editing Questions & Headings
- Reviewing Submitted Student Applications
- Working with the Scholarship Student Selector Report
- Screen Shot Examples of Student View

For questions, or to schedule in-person training, please contact the Office of Student Finance Scholarship Unit.
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Getting Started:

Online Scholarship Application Access:

* In order to use the application tool the Office of Student Finance must first set up 'Administrator' access for at least one staff member in your college. **Please email the OSF Scholarship Unit at saosf@umn.edu to request Administrator access.** Administrators then have the ability to add access for other staff members in their college.

Signing In:

1. Go to: [https://onestop2.umn.edu/scholarship/admin](https://onestop2.umn.edu/scholarship/admin) (copy and paste the link)
   - For best results use the preferred internet browsers Mozilla Firefox or Google Chrome (Safari also works for Mac users)
2. Enter your Internet ID and Password to Sign In.

Administrator’s screen after Sign In:
Assigning Administrative Roles for Staff:

As an ‘Administrator’ you may assign roles for individual University staff in your college/unit by clicking on the ‘Add new’ link at the top of the page.

Roles Defined:

- **Administrator** role: Has access to *all online scholarship application functions* (including Student Selector data) for the college/unit including adding/editing/deleting access roles.
- **User** role: Has access to all online scholarship application functions (including Student Selector data), but **cannot add/edit access roles** for the college/unit.
- **Reviewer** role: Has access only to submitted student applications for the college/unit.

![Create user form]

- Enter the University staff member’s internet id and tab to the next field. You should see the staff member’s name populate in the second field.
- The third field should automatically select your college/unit – will not allow you to choose another.
- In the bottom field use the drop-down menu to select the appropriate role.
- Click ‘Save.’ You will now see the new University staff member listed on your Role Administration page.
- ‘Administrators’ can edit/delete access for college/unit staff at any time from this page.
Creating New Scholarship Applications:

1. In the Applications section on the main page, click on ‘Add New’ to start a new application.

2. Enter your ‘Current Application Cycle’ dates (students will only be able to access your application between the dates that you enter). Note: If your application deadline is the 15th of a month you must enter the 16th as the end date in the system because it will shut the application down at 12:00 am on the 16th.

Creating/Editing Application Instructions:

1. Enter your application instructions and format them in this section. Click ‘Submit’ when finished. Students will see these instructions when they sign into the application prior to answering questions.
2. If entering a link to an external website, click on the “Insert/edit link” icon 📖. The below window will pop up. You are able to enter the link information as you would like it to be displayed to the student. Make sure the Target is always set to New Window. This will enable the link to open within a new window or tab without navigating the student away from the Scholarship application.

Creating/Editing Questions & Headings:

1. After clicking ‘Save’ on the instructions, you may now scroll down to the ‘Questions’ section.

2. Enter your question text in the first field under ‘Question/Field label’.
3. Select the ‘**Type of response**’ you want the applicant to provide.

- **True/False** will provide a check box for the applicant to select or leave blank. The question text for this type of response should be written as an affirmative statement (e.g., ‘I have Irish ancestry’ or ‘I am the first in my family to attend college’).
- **File Upload** allows a student to attach and submit a document with the online application (e.g., Word document, pdf, Excel spreadsheet, etc.)
- **Long Answer** allows a student to provide a response that you may limit by the Max # of words - must also select data type (e.g., ‘text’).
- **Short Answer** allows a student to provide a response that you may limit by the Max # of characters - must also select data type (e.g., ‘text’).

4. **‘Field Instructions (placeholder text)’** allows the Administrator to include additional directions or clarifications pertaining to the question being asked. The placeholder text will display to the students in the text box where they will enter their answer. The placeholder text will disappear once the student begins typing. **Note: placeholder text is not available for True/False or File Upload options.**

5. ‘Save Question’ – Your question will then show up in the ‘Question Lists’ section.
6. ‘Headings’ are optional and may be used to highlight or separate sections of your application or to group related questions (e.g., ‘Study Abroad Questions’).
   - Enter your Heading in the ‘Group Heading’ box and then click ‘Save Heading.’
   - Heading will then appear in the ‘Question Lists’ in a slightly darker shade than the Questions.
   - Headings appear in bold text on the student application.

‘Available Fields & Questions’ vs. ‘Selected Fields and Questions’

1. When you create a new Question/Heading it will first appear under the ‘Available Fields & Questions’ column on the ‘Question Lists’ page. See SAMPLE list below. Note: Headings are a slightly darker color.
2. If you want a Question/Heading to display to students on the application you must **click and drag** the question from the ‘Available Fields & Questions’ column to the ‘Selected Fields and Questions’ column and then click ‘Save list.’

3. You may move questions/headings from one column to the other at any time. The changes are made real-time and changes are live on the student application side as soon as you click the ‘Save list’ button.
   - Ex: You decide that you have received enough responses for a particular scholarship question and wish to remove that question from your online application. Just drag it to the left column (‘Available Fields & Questions’ and click ‘Save list.’

4. To edit or delete a question/heading move the question/heading to the ‘Available Fields & Questions’ column and click ‘Save List.’ In the ‘Available Fields & Questions’ column double-click on the question/heading you wish to edit to make changes. To remove the question from your lists click the ‘Delete Question’ button.

**SAMPLE:** True/False questions will appear as below to the student.
5. Once you have created an application, you may also ‘Duplicate this Application.’ This would be useful if you want to copy an application’s instructions and question list.

6. Once you click on ‘Duplicate this Application,’ a new scholarship will be created with the title “CLONE of xxx.” You are now able to update/edit the Title of the application as well as the current application cycle, aid year, instructions, and question lists.

Archived Applications

1. Once an application is closed, it will become an “ARCHIVED” application. You will still be able to edit/view the application title, instructions, questions, and list of applicant information. Students will no longer be able to see an application once the close date of the application cycles passes.
Reviewing Submitted Student Applications:

‘Current Applicants’

1. When on the ‘Application Administration’ page, you may click on ‘Applicants’ to view a list of applicants.

Or, from the main page, you may click on the number in the ‘Applicants’ column to view the list.
2. Columns are sortable. Ex: Click on the column title ‘Name’ to sort applications alphabetically by student or ‘Application Date’ to sort by the date students submitted their application.

3. You may also “apply date range” to applicants.

4. **Note About Applicants in Date Range**: If you click on the selection box for an applicant and then apply a date range, the applicant with the check box selected will still show when viewing/printing applications regardless if he/she is inside the selected date range. To ensure viewing/printing of only applicants within a selected date range, make sure to “unselect all” before applying a date range and then selecting applicants to view or print.

5. To view individual applications click on the student’s name to view a summary of the submitted application.

6. From this view you may print the application and also open any files attached by the applicant.
7. You may view and/or print multiple applications at the same time by selecting multiple applications in the far right column and clicking the ‘Print selected applicant(s)’ button.

8. To download the applications to an Excel spreadsheet click the ‘Export all applicant(s) to Excel’ button.
   - Note: The Excel export will include all questions and answers from all applications including links to attached files. The export will allow staff to sort/filter the data in Excel to make it easier to work with.

9. Only ‘Administrators’ and ‘Users’ will have access to a third button, ‘Export Student Selector data to Excel’ on current aid year applications.
   - Note: This is the same information as you find in the ‘Scholarship Student Selector’ in the STAR system, except this report will sort by student last name rather than need. The selector data will not be available for past aid years. ‘Reviewers’ will only have access to view/print the student applications per FERPA guidelines.
Working with the Scholarship Student Selector Report:

Column Definitions on Excel Spreadsheet for Student Selector:

1. **Emplid** – Student’s PeopleSoft ID.
2. **Name** – Student’s name.
3. **Aid Year** – The Federal Financial Aid year you have selected to award your scholarships. This may be either the current year or the next Financial Aid Year.
4. **Process Status** – This field shows whether the student has a completed financial aid application on file. Use the value ‘Completed’ when awarding Need-Based scholarships.
   * 'No App Rcd’ – the student did not complete the Free Application for Federal Student Aid (FAFSA).
   * 'Applied’ – the student’s application (FAFSA) has been received but not processed.
   * 'Review' – the student’s application (FAFSA) has been received but additional information has been requested to complete the application.
   * 'Package' - the student has been offered financial aid
   * 'Completed' – means the student has a FAFSA on file and has been offered financial aid for the academic year
5. **FAFSA (Free Application for Federal Student Aid) Date** – The date the financial aid application was received by the Office of Student Finance. This field can be used to determine the order in which students applied for financial aid.
6. **Cost of Attendance** – Standard cost of attendance as determined by the Office of Student Finance. If the student did not apply for financial aid via the FAFSA the Cost of the Attendance value displayed will be ‘NULL’.
7. **Expected Family Cont** – This is the amount that the family is expected to contribution to the student’s education as determined by the Federal Need Analysis formula from the FAFSA.
8. **Grants/Schol** – The total of all grants and scholarships awarded to the student.
9. **Need Before Work/Loan** – The value will be the dollar amount of need the student has after subtracting the student’s GRANTS/SCHOL and EXPECT FAMILY CONT from the COST OF ATTENDANCE. If the resulting calculation is less than zero the value displayed will be zero. The spreadsheet is sorted in the descending order of NEED BEFORE WORK/LOAN (e.g. the highest need students are at the top). Note that out of state students have higher need because their cost of attendance is higher. As a result they will tend to be at the top.
10. **Dependency** – Dependency status determined by the FAFSA. The values displayed will be either ‘Dependent’ or ‘Independent’ if the student has completed a FAFSA. If the value displayed is ‘Not Available’ that means the student has been awarded a Non-Need-Based institutional scholarship but has not filled out a FAFSA. These student will have a Cost of Attendance listed.
11. **Career** – Undergrad, Graduate, Law, Medicine, Dental, Pharmacy or Veterinary Medicine.
12. **Program** – The student’s college of enrollment. If the student is enrolled in more than one college he or she will appear more than once.
13. **Plan** – The student’s major. If the student has more than one major he or she will appear more than once.
14. **Plan Type** - If the Plan is the major, minor, or undeclared (PRE)
15. **Sub Plan** – Depending on the student’s Program and Plan this field may provide additional Information useful in awarding a scholarship.
16. **Acad Level** – (e.g. Freshman, Sophomore …)
17. **Credit Load** – The number of credits that the student has registered for during the current term (from the Office of the Registrar’s (OTR panels). This value is taken from the UNTS_TAKEN_PRGRSS field in PeopleSoft.
18. **Cumulative GPA** – The student’s current Cumulative GPA from the OTR panels on PeopleSoft.
19. **Total Credits** - Total credits passed from the OTR panels. This value is taken from the TOTAL_PASSD_PRGRSS field in PeopleSoft.
20. **Admit Term** – The term that the student was admitted to the Program and Plan listed on the row. Students with multiple Programs or Plans may have more than one Admit Term.
21. **Admit Type** – The student’s admission type (e.g. NHS, IUT, NAS…)
22. **Last Enrolled Term** – The last term during which the student enrolled for classes.
23. **Last Reg Status** – The student’s Admit Type during his or her last term of enrollment.
24. **FERPA** - The student selected level of data privacy. Do not give out information that the student has requested to not be disclosed.
25. **Prog Status** – This field indicates the student’s program status (e.g. Admitted, Active, Prematric, etc.).
26. **Prog Action** - This field is used for New students to indicate where the student stands in the process of matriculation.
27. **Honors** – Indicates whether the student is in an Honors track within their college of enrollment.
28. **Gender** - Male or Female.
29. **Residency** – The student state of residency from the ADMISSION_RES field in PeopleSoft.
30. **Citizenship** – Citizenship status of the student from PeopleSoft.
31. **Ethnicity** – The student’s self-reported ethnicity from PeopleSoft.
32. **Age** – Age of the student.
33. **Last School** – The student’s school prior to attending the University. For new freshmen this is typically the student’s High School of graduation. For continuing or graduate students this may be a college within or outside of the University.
39. **Home City** – Home city from the address file.
40. **Home County** - Home County is often blank.
41. **Home State** – Home state from the address file.
42. **Home Country** -- Home country from the address file.
43. **Home Zip Code** – Zip code or foreign country postal code.
44. **Self Reported State** - The student’s self-reported state of residence.
45. **Email Address** – Student’s email address.
Working with the Scholarship Student Selector Report (cont):

Business Rules:

Filtering a list means displaying only a part of it. You provide the criteria you want used, and then Excel displays only those list records that match the criteria. Filtering is especially useful if you have a large list and you want to work with only a subset of the records in the list.

The easiest way to filter your list is to use the AutoFilter feature. You do this by following these steps:

1. Selecting any cell in your list.
2. Choose Filter from the Data menu. Excel displays a submenu.
3. Select AutoFilter from the submenu. Excel determines where your column (field) labels are located and adds pull-down arrows to the right side of each label's cell.

AutoFilter is now alive and well in your workbook. If you click on one of these pull-down arrows, Excel displays the unique values in that column (field). You can then select one of the values and Excel displays only those records that match that value for that field. (The pull-down arrow then turns blue.) All the rest of the records in the list will be hidden.

Tips for Awarding Need-Based Scholarships:

The spreadsheet is setup with filters that you can use to select a specific group of student based on the values found in the column. For instance if you were awarding a scholarship that requires that the student show Need first determine if the student applied for aid and has been awarded aid by the Office of Student Finance.

To make this determination, select the ‘Completed’ from the Process Status drop-down list. A ‘Completed’ status means that the student has been awarded financial aid. Other statuses such as ‘Review’ or ‘Applied’ mean that the student has not yet been awarded financial aid. ‘No App Rcd’ or a blank field indicates that the student did not apply for financial aid.

Note that a date will appear in the FAFSA Date column if a student has completed an application for financial. You can use this date to determine when the student applied for financial aid.

There are four columns in the spreadsheet that will tell you if a student has need as determined by the Office of Student Finance. The columns are ‘Cost of Attendance, Expect Family Cont’, Grants/Schol’ and ‘Need before Work/Loan.’ The spreadsheet has been sorted to list students with the greatest amount of need and who have been awarded financial aid at the top of the spreadsheet.
The formula used to determine financial need is:

\[
\text{Cost of Attendance minus}
- \text{Expect Family Cont}
- \text{Grants/Schol}
\]

\[= \text{Need before Work/Loan}\]

If a student's Expect Family Cont is greater than Cost of Attendance then the student has No Need.

Cost of Attendance is a student budget established by the Office of Student Finance for the current year. Note that non-resident students tend to have a higher Need before Work/Loan amount because they have a higher cost of attendance as a result of paying non-resident tuition.

Expect Family Cont is the amount that the Federal government expects the family to contribute to the student’s education for this year.

Grants/Schol is the total of all grants or scholarships awarded to the student to date for this year.

Need before Work/Loan (or unmet need) is the amount of scholarship money that the student may receive without affecting the student’s other grant or scholarship awards. If a student receives awards beyond this amount loan or work awards may have to be reduced. If you intend to award an amount greater than the Need before Work/Loan amount consult with the Scholarship Staff in the Office of Student Finance to determine the impact on the student’s other awards.

**Note About Student Selector Excel Export:** The Excel export displays student names in one column (‘Last Name, First Name’) for the Student Selector and in two separate columns (‘Last Name and First Name) in the Student Applicant questions download. Administrators should be able to sort each list by ‘Last Name’ if desired.
Screen Shot Examples of Student View:

1. The student will login to: [https://onestop2.umn.edu/scholarship](https://onestop2.umn.edu/scholarship)
   - For best results use the preferred internet browsers Mozilla Firefox or Google Chrome (Safari also works for Mac users)
   - They will see the general instructions page when they initially log in. Student will click ‘Yes, let’s begin…’ to go to the list of available scholarship applications.
2. The student will see a list of available open applications.
   - They can also navigate back to the initial screen by clicking on ‘Instructions and Tips.’
   - They can review or apply for an application by either clicking on the title or ‘Apply now.’
   - **Note:** The student will no longer see a scholarship on this list if it is after the close date.
3. Once they click on an application, they will see the title and instructions followed by the headings/questions selected for the application.
The student will answer the questions that apply to them. If they reach the limit on the amount of characters/words in their question, they will receive a warning message (the system will not allow them to type more than the limit):

4. Once the student answers the questions and clicks on 'Continue application' they will be able to review/print their responses prior to submitting the application.
   - If they see an error, they can click on 'I’d like to make some changes' to go back and edit responses. Note: they cannot change an already uploaded document once that is uploaded.
   - They should also be encouraged to 'Print my application' as once they submit the application, they will no longer be able to view the information.
5. Once they check the box next to 'I have read and understand the conditions stated above' they will be able to click on ‘Submit my application.’

6. The student will receive confirmation that the application has been submitted.

7. If they click on ‘Return to scholarship’ they will go back to the list of applications and will see that the application they just submitted has an updated status of applied.
For Questions: Contact the Office of Student Finance Scholarship Unit

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