

Scholarship Administrators Meeting - Minutes

April 5, 2017

Introductions

Financial Aid/Scholarship Updates – Dianne Danov

- This really should be the last meeting Dianne will lead, the Office of Student Finance has filled her position. Dianne is still working about two days a week for OSF – her phone number will remain the same.
- From Tina Falkner’s email announcement: “On Monday, April 10, 2017, Michelle Curtis will join the Office of Student Finance as the Associate Director of Compliance, Scholarships, and Athletic Aid. Michelle served in a similar capacity at the University of Wisconsin - Madison for 10 years. She brings a wealth of compliance understanding and application, broad financial aid operations experience, PeopleSoft experience and a demonstrated commitment to student success.”
 - o Updated contact information for Michelle will be posted to our Scholarship Administrator training page once available.
- There are over 9,000 awards posted (~\$45 million) for 2017-18.
- We had been encouraging student to use the IRS data retrieval tool when filling out their FAFSAs, however, that tool is no longer available due to security concerns. The process may not be available again until October 2017. Students need to fill out the tax information as accurately as possible and may need to request copies of their tax transcripts from the IRS if selected for verification.
- OSF packaged Transfer students last week (478 transfer students)
- Awards for continuing students can begin in June (exact dates to be determined)
- STAR training will be updated, there is a group working on updating documents and getting all the training materials in one place – more updates to come as they continue meeting.

Summer Scholarships – Nate Rosckes

- Summer registration begins for most students on April 11th.
- In order for awards to post correctly, students need to be registered for the Summer term. If the student is not registered, the award will receive an error. We will contact you with the information as well as comment the record. You will be able to review your files and any notes on the records in the “Scholarship Upload Status” report on the Reporting Center.
- Reminder that May session is part of Summer.
- First disbursement for Summer starts June 5th.

Summer Research GRD 4999/UGRD 4999 – New Process – Kari Ellering

- Background
 - o To make payments to students through the student system, the Office of Student Finance must follow the US Department of Education and the US Internal Revenue Service regulations. In order to receive financial assistance the student must be enrolled for credit and be assessed tuition. ***The only exception is if the student is engaged in research during the summer.***
 - o If a student is involved in a documented research opportunity during the summer term, and is not otherwise required to be enrolled, there is a course that has been created

that allows scholarship payments to be processed through PeopleSoft's Scholarship Automation.

- The courses (GRAD 4999 and UGRD 4999) are set up as a placeholder for 0 credits with no tuition/fees in order to allow the Office of Student Finance (OSF) to disburse the scholarships.
- Previous Process
 - Registration in the summer 4999 course had to go through the Office of Student Finance (OSF) and the Office of the Registrar (OTR).
 - Many back and forth emails took place to confirm student eligibility for the awards and document the research requirement of the course.
 - In some cases, the extra steps impacted the timing of the disbursement to the student.
- Updates
 - Departments will be able to assign permission numbers to allow students to register for the course during the summer registration process (begins on April 11th). If you or anyone in your department have questions about permission numbers, please contact the Student Records team at srhelp@umn.edu.
 - Registration for the 4999 course will not need to go through OSF/OTR. Departments will be able to look up data/run queries on these courses like any others.
 - Departments still need to document the research opportunity for audit purposes to be able to justify the 4999 registration and the awarding of funding.
 - Includes reviewing the scholarship MOA (Memorandum of Agreement) to ensure the scholarship can be paid to non-enrolled students who are conducting research during the summer.
 - Students need to be registered for the summer 4999 course before the scholarship file is uploaded, otherwise the file will receive an error and will need to be reprocessed once registration is complete.
- Communication: An email will be going out soon (included at the end of meeting minutes) to those responsible for registration for students and the scholarship admin listserv.

Reporting Center – START reports – EFS Budget Upload – Bob Balfour

- See EFS Budget Upload handout (included at the end of these meeting minutes) – instructions on how to download the spending plans from STAR and upload the information into the EFS budget. This should help save time for accountants entering spending plans in both STAR and EFS.
- Reminder to send any questions or insights on STAR reporting/training to asrSTAR@umn.edu
- There is a group working on updating training documents and communications around STAR.

Next Meetings June 7, August 2

Procedures for GRD 4999 and UGRD 4999 Registration

These courses were created to make it possible to process a scholarship payment in PeopleSoft when a department wants to pay non-enrolled students for research related to their academic program. These were designed specifically and only for summer term because PeopleSoft cannot pay financial aid when there is no enrollment. These courses are set up as a placeholder for 0 credits and no tuition/fees attached to them in order to allow OSF to disburse the scholarships.

Summary:

To make payments to students through the student system, the Office of Student Finance must follow the US Department of Education and the US Internal Revenue Service regulations (see additional payment guidelines from the Tax Management Office: [TMOG #8](#)). In order to receive financial assistance the student must be enrolled for credit and be assessed tuition. The only exception is if the student is engaged in research during the summer.

If a student is involved in a documented research opportunity during the summer term, and is not otherwise required to be enrolled, there are courses that have been created that allow scholarship payments to be processed through PeopleSoft's Scholarship Automation. The courses (GRD 4999 and UGRD 4999) are set up as a placeholder for 0 credits with no tuition/fees in order to allow the Office of Student Finance (OSF) to disburse the scholarships.

Departments will assign registration permission numbers to be used for students registering for the 4999 course during the normal registration process ([quick start guide available here](#)). The 4999 course will appear on student transcripts as summer research. The 4999 registration is not necessary if the student is registered for other courses during the summer. Please note that the students need to be registered for the summer term prior to uploading your scholarship file.

If you have reviewed the scholarship MOA (memorandum of agreement) and have determined that a scholarship may be paid to non-enrolled students who are conducting research during the summer, please give the students the correct permission number so that they can register in the 4999 course. Departments will need to document the research opportunity for audit purposes to justify the 4999 registration and awarding of funding.

Please contact the Office of Student Finance Scholarship Unit at saosf@umn.edu if you have any questions.

Please contact the Student Records team at srhelp@umn.edu if you have any questions about the permission numbers.

STAR EFS Budget Upload

Go to Summary and Spending Plan and choose download type EFS Budget.

- The download from STAR includes all columns required for the EFS budget upload, including columns for chartfields not used in STAR.
- All chartstrings from STAR will populate into the file for budget purposes (even those with 0 or no spending plan set)
- The budget amounts in the download are spending plan based, so if there is no spending plan set, budget rows will display 0's and you can manually update as needed
 - ***There is no verification at the time of file creation as to whether there are funds available to cover what is budgeted in the file - the assumption is that since it is all based on the spending plan that was set and that verification was done by whoever set the spending plan
- If it is a multiple deptID scenario (as indicated in STAR and the first column in the file), amount fields other than the scholarship expenditure will require manual work
- As with the rest of STAR, chartfield2 is not applicable and chartstrings will only budget to the fund-deptid-program-CF1-account level.
- Current EFS balances will be budgeted as carryforwards and will also decrease the 540100 Gift & Bequest budget line
 - **Negative carryforwards be budgeted as 0 and not affect the 540100 Gift & Bequest budget line since the assumption will be that the deficit will be taken care of by June 30
- The first column will indicate if review is needed for any CF1s associated with a NULL field as well as multiple deptID scenarios
- Chartstrings with unusual scenarios that do not fit the standard will still populate, but will have NULL fields that will require manual intervention. ALWAYS verify your file before upload.
 - These include non-UMF and non-endowment funds
- Timing:
 - Spending plan changes will be reflected immediately
 - EFS financials are pulled from the data warehouse and updated on a nightly basis
- Prior to upload, remove the header and also the first column (the flag for more review needed). Follow EFS budget entry upload instructions at <http://finsys.umn.edu/training>.
- The only time the 'Exclude' flag will be set to 'Y' is on the 900100 budget lines when the current EFS balance is 0 (so row will appear as a budget line of 0 and the Exclude flag will = 'Y')

Contact for question: asrSTAR@umn.edu