

Guidelines for Naming Scholarship Item Types in PeopleSoft

Revised 01/02/2019

- Review both the scholarship MOA and any revised MOAs in STAR for the official name of the scholarship fund as it was created. In checking STAR:
 - We have found the donor has requested an updated scholarship name but the name had not been changed in PeopleSoft.
 - We have found scholarships where the name of the donor was cut off in PeopleSoft because the character limit exceeded 30 characters. Ex: Both the entire first name of both donors was used, allowing for only the first two letters of the last name.
- If the scholarship Item Type name is entered incorrectly or you find a scholarship name you want updated, contact Dianne Danov (d-dano@umn.edu) or Bob Balfour (b-balfo003@umn.edu) in the Office of Student Finance. They can review for the proper name and update it in PeopleSoft.
- Changes made to the Item Type name are reflected on the Students' Financial Aid Award Notice, the Student Account and on MyU portal. It is updated in the history panels of PeopleSoft so prior years are also updated on the student side. **Note:** The Item Type name, as it was awarded, will appear in STAR. If a change is made after the scholarship was awarded the name change will not be reflected in the STAR recipient list.

Naming Convention

- Only 30 characters are available for the scholarship Item Type name in PeopleSoft. Each space counts as one character.
- Use Scholarship, Fellowship or Award in the name – something descriptive (Ex: use David Wong Scholarship instead of only David Wong).
- Check the spelling of donor's names for accuracy. (Ex: "Jenine" was listed as "Jeannine").
- Include the donor's first and last name. If not enough characters, use the first initial of the donor's first names (Ex: W and R Pennington Scholarship instead of William and Rosemary Pennington Scholarship).
- PeopleSoft **will not accept a period or other special characters** (Ex. the "&" sign) in the Item Type name in Scholarship Automation. When trying to Save in PeopleSoft, you will encounter an error message. You will need to remove the special character and contact Dianne Danov or Bob Balfour to add the character manually.
- If character space is needed, you can also eliminate the spaces between the "&". That saves two characters and looks fine in PeopleSoft. It will appear as Bill&Susan Smith Scholarship. You will need to contact Dianne Danov or Bob Balfour to make this change.
- Capitalize the first letter of each word in the Item Type name (Ex: Samuel Anderson Scholarship, instead of Samuel Anderson scholarship).
- Do not use all capital letters when creating a Scholarship Item Type. Use *Class of 1946 Scholarship*, instead of *CLASS OF 1946 SCHOLARSHIP*.
- Use "Schol" if there is not enough space for the entire word "Scholarship" in the Item Type name.
- Use "Fellow" if there is not enough space for the entire word "Fellowship" in the Item Type name.

Summer Scholarships

- A separate dedicated Item Type is required for processing summer scholarships in PeopleSoft.
- You can include the word "Summer or SS" in the Item Type name to differentiate a Fall/Spring scholarship from a Summer scholarship when using the same name.
 - Example: John Doe Scholarship and John Doe Scholarship Summer

If you have any questions about new item types you are either creating or updating, contact Dianne Danov or Bob Balfour.