UM Departmental Scholarship Processes

February 19, 2016

Included in this document are the detailed steps required for processing UM Department Scholarships.

The sections include:
1) Scholarship Access
2) Creating item types
3) Creating Scholarship (.csv) files for upload
4) Uploading Scholarship (.csv) files
5) Reporting Center

Scholarship Access

Dept ID security will be applied to the Item Type Create page. Role level security will be applied to both the Item Type Create and Scholarship Upload pages. Dept ID and role level security will be carried forward from 8.9 to 9.0 for existing users. New staff will need to submit an ARF (Access Request Form) to Data Security before creating new item types and uploading scholarships.
Item Type Creation
The existing pages and process for creating Item Types for Scholarships has not changed extensively from the 8.9 application to the Upgraded 9.0 system.

1. In the portal, once you click on ‘PeopleSoft’ under your Key Links, make sure you are in Campus Solutions.

2. When in PeopleSoft Campus Solutions, navigate to:
   - “UM Create Scholarship Itm Type”: Main Menu > Financial Aid > UM Scholarships > UM Create Scholarship Itm Type

3. Enter:
   - Academic Institution
   - Aid Year
   - and then click ‘Add’
4. Enter your scholarship account string including Fund Code, DeptID, Program Code or Project ID, Account (800102), Chartfield 1/Chartfield 2

5. Click ‘Search for Item Type’ button to check for existing item types attached to the account string entered.

6. That will pull up existing item types to be used

   **Note:** If there is more than one item type attached to the account string, you will need to find the additional item types by using the search function 🔍.
7. If no item type is found, or if you wish to create an additional scholarship item type on your account string, click ‘Create Item Type’ button.

8. Type in a ‘Scholarship Name’ in the field provided (30 character limit).
   Note: this will be the scholarship description students see in their financial aid package.

   Note: Enrollment Requirement defaults to ‘Enrolled Full-Time’ per University financial aid policy.
9. Click ‘OK.’ Your new scholarship item type has been created and is ready to use for entering scholarships for students.
Creating Scholarship (.csv) Files for Upload

Start by opening the **REQUIRED** Excel template. The “**Department Scholarship Template**” file can be found on the ASR website at [asr.umn.edu/training/scholarship_administrators](asr.umn.edu/training/scholarship_administrators)

**Note:** You will need to log in with your Internet ID and Password to access the web page.
The “Department Scholarship Template”

NOTE: This is different than PeopleSoft 8.9. Before you entered scholarships by “UM Use Scholarship Entry” within PeopleSoft. Now this process is done through a template that needs to be uploaded into PeopleSoft.

In this new template, you will enter scholarships by filling out Student ID, Item Type Number, Award Amount, and Term(s).

There are edits on all of the columns within the template that must not be altered for your file to upload successfully:

- ID = must be a 7 digit number
- Item Type = must be a 12 digit number starting with a 94
- Award Amount = cannot be currency (contain $). It must be formatted as a “Number” and must be less than 100,000
- Term(s) – must be one of the drop-down menu options: Fall/Spring, Fall Only, Spring Only, or Summer
  - Selecting the “Fall/Spring” option will divide the award amount equally between the two semesters. For example, if the award amount is $1000 and the Term(s) is “Fall/Spring”, $500 will be placed into Fall and $500 will be placed into Spring
- You can put multiple item types on the template. You do not need to upload a separate file for each item type.

NOTE: If you are using the copy and paste function, please review the detailed information on page 10-11 to ensure the formatting is not altered.
EXAMPLES:
Every scholarship will require an Empl ID, Item Type, Award Amount, and Term(s). Below is an example of a total scholarship award of $2000 with an even split Fall/Spring award ($1000 will be placed into Fall, and $1000 will be placed into Spring).

Below is an example scholarship file entered with multiple students and multiple item types as even split Fall/Spring awards.
NOTE: If you wish to cancel out a scholarship for one term, you would enter the amount and term you wish to keep. For example, if you originally had a $2000 Fall/Spring award, and now want $1000 Fall Only, you would create a file with the Student ID, Same Item Type, Award Amount of $1000, and Term(s) Fall Only. This new file will replace the previously entered scholarship award (there is no need to enter a separate line for Spring).

If you wish to add or adjust an amount for one term (no longer keeping it an even split), you would enter the amount and term you wish to adjust along with the term you want to keep. For example, your original award was uploaded as F/S for $2,000 and now you want to increase the Spring disbursement by $500. You would enter one line with Fall at $1,000 and another line for Spring at $1500. If you were to only upload a line for the Spring increase of $500, it will replace the original F/S for $2,000 with the Spring only award of $500.
COPYING AND PASTING

**NOTE: If you use a copy and paste from a different source, make sure you choose “Match Destination Formatting” or “Values” from the paste options. Using the default or “Keep Source Formatting” will result in the edits being overridden and your .csv file not being properly formatted for upload.

Use “Paste Options”
Use “Match Destination Formatting”

Or Use “Values”
SAVING THE TEMPLATE

You must do a ‘Save As’ and specify a .csv as the format (in a secure location).

You must start the file name with your college abbreviation (e.g., CLA, CSE, CSOM, CEHD, CDES, CFANS, CCE, DENT, PHARM, etc.). If you are not in a college, use your area abbreviation (e.g., OED for the “Office of Equity and Diversity” or OSF for the “Office of Student Finance”, etc.) The file name cannot be longer than 31 characters including the .csv extension.

NOTE: If using a PC, do the ‘Save As’ a Comma delimited .csv file: If using a Mac, see 2nd screenshot below.

CAUTION: Once you save it as a .csv file, you cannot continue to edit the file. It should be considered a final step and ready to upload into PeopleSoft.

NOTE: If using a Mac, do the ‘Save As’ a Windows Comma Separated .csv file (see below):
After the ‘save as’, it will ask you to keep using format. Click “yes”.
Preview the File via Notepad (Optional)

If you would like to make sure the file is formatted correctly, you may review the contents of the file before uploading to PeopleSoft. Find the file, right click and find Open With > Notepad (Mac users – open with TextEdit)

In Notepad, a correctly formatted file should look like the below screenshot. You should see the Student ID, Item Type, Award Amount (without $ or any other symbols) and Terms (abbreviated). The formatting seen below is required for uploading purposes. If anything does not look correct, you will need to re-enter all of the data on a new excel template from the ASR webpage on: asr.umn.edu/training/scholarship_administrators
Uploading Scholarship (.csv) Files (PeopleSoft Scholarship Entry)

1. In PeopleSoft, make sure you are in Campus Solutions and navigate to:
   - Main Menu > Financial Aid > UM Scholarships > UM Scholarship File Upload

2. Enter:
   - Academic Institution
   - Aid Year
   - and then click ‘Click to Upload file’ button.

3. Locate your .csv file on your computer and select it for upload.

4. Click ‘Upload’ button.
5. After you “Click to Upload File,” your scholarship entry process is complete. If the upload is not successful, it means one of two things:
   1) you do not have your file formatted to a .csv file or
   2) your file name contains more than 31 characters. If that is the case, you will need to re-create the file.

6. The file(s) you uploaded will be processed automatically overnight if you enter the file by 1:00 pm that day. The process runs Monday – Friday evenings.

7. Click ‘Refresh’ button to upload additional scholarship files.

Warning: No scholarship files should be uploaded after the financial aid year has ended (the financial aid year ends on the last official day of Summer term in August). Scholarship files uploaded after the official close of the aid year may not be processed correctly in PeopleSoft. If you have a situation that requires a scholarship adjustment after the close of the aid year, please reach out to the Office of Student Finance Scholarship Unit at saosf@umn.edu for guidance.
**Reporting Center**

The *Scholarship Upload Status Report* provides scholarship administrators the ability to see the status of their department’s scholarship files after they have been uploaded into PeopleSoft.

**NOTE:** To review your entries in the *Scholarship Upload Status Report*, allow one business day for the file(s) to be processed (if the file was entered before 1:00 pm)

To find the report, when you are in your portal, click on ‘Key Links’. Then from the drop-down select ‘Reporting Center’.

In the ‘Reporting Center’, you will find the “Scholarship Upload Status” Report under *Student Services > Financial Aid*.

![Image of Reporting Center](image)

**Note:** You may also click on the “information” button left of the report for further documentation about the report.
The report will prompt for:

1. Academic Institution
2. Aid Year
3. Date Range
4. DEPT ID.

UM_REPCEN_SCHOL_STATUS - Reporting Center Schol Status

<table>
<thead>
<tr>
<th>Academic Institution:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aid Year:</td>
</tr>
<tr>
<td>From Date:</td>
</tr>
<tr>
<td>To Date:</td>
</tr>
<tr>
<td>Department:</td>
</tr>
</tbody>
</table>

View Results

| Trans Date | Trans Nbr | Seq ID | Last Name | First Name | Institution | Aid Yr | Status | It... |
Review your report. If the record went through and posted, it will show “processed”. If a record shows “error” or “skip” or “suspend”, or “duplicate,” the Scholarship Unit will resolve the issues and contact you if necessary.

You also have the option to export the report to Excel. In Excel you have the option to sort and filter results of the report.

Note: Some key terms to note on the report:
- Trans Date: Date scholarship file was posted
- Trans Nbr: File number in PeopleSoft
- Status: “Processed”, “Error”, “Skip”, “Suspend” or “Duplicate”
- Term(s): FS = Fall/Spring, FO = Fall Only, SO = Spring Only, ZO = Summer

Note: For any questions about disbursement of scholarships, please check STAR.
Questions?

Please email:

saosf@umn.edu

After you have reviewed all of the training materials, if you are still having problems with any of the processes, email or call the Office of Student Finance Scholarship Unit. We will work with you to resolve any issues you may have.

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