

Scholarship Processing

Processing Scholarship Awards in PeopleSoft

- Depending on the administrative structure of your department, the individual responsible for making scholarship awards should provide the accountant with the names, employee IDs, account string data (or title of award) and award amounts for fall and spring semesters, e.g.:

<u>Name</u>	<u>EMPLID</u>	<u>Account String</u>	<u>Fall Amnt</u>	<u>Spr Amnt</u>
Jane Doe	9054300	1701-11111-20495-UMF0009999 (CF1)	\$1500.00	\$1500.00

- This data should be forwarded to an EAS for entry into PeopleSoft. If the account string represents a new funding source, the accountant will need to process a budget journal for the account string in EFS in the Commitment Control module. No scholarship or fellowship can be processed without an Item Type number which is assigned by central administration and linked to the account string. This number contains the name of the award, e.g.: "Donald Trump Scholarship in Business Administration." If the item type is not set-up, one can be generated at the time of award entry.
- Make sure a combo code is set up for the accounts and if not, contact the accountant to set it up.
- ***When the EAS enters the scholarship, they need the name, chartfield, aid year, term, name of scholarship. After the EAS enters this information into PeopleSoft, save it and, depending on the process being followed by the particular service team, either submit or send to the appropriate accountant for approval.***

Scholarship Processing Q & As

Q) How do I gain access for Scholarship entry or approval?

A) Go to the Scholarship Automation website: <https://asr.umn.edu/node/304>

Read the handbook, pass a quiz, and request access through the ARF (with SA PeopleSoft Scholarship Processing attachment.)

Q) Where do I find information about scholarship processing (process, definitions, error messages, etc.)

A) In the Scholarship processing handbook at website above.

Q) How do I cancel a scholarship award?

A) If you need to cancel an award (if student does not meet enrollment requirements, graduates early, etc) you may need to remove their award. Enter the same information as entered earlier and adjust the amount for the appropriate semester that you are cancelling, change the amount to "0" for the semester. Do NOT change the award amount for other semester/s that are not changed. Otherwise, the student could end up with a bill if you change a prior semester to "0", or the student could be paid twice if you re-enter a new amount for a prior qtr.

Q) Is there a report for scholarships?

A) The “Foundation Account Summary” report - provides drill-down information for scholarships (and fellowships) on 1701 and 1750 EFS funds, by department, for Foundation funds. The Treasury Accounting 1750 funds are not included in this report. Also, see the “Student Assistance Account Summary Report.” (You will need to have Student Data Inquiry Training and request access to these reports through the ARF process.)

The Foundation is currently creating a database for scholarship tracking and reporting (STAR); users may check that screen in DMS for a list of scholarship recipients for their units.

Q) How do I know if a scholarship paid out?

A) Go into Scholarship Automation / UM View Batch / Student Details. Enter batch number or DeptID to search for the batch. After entering the batch number, you should see a list of students. Click on the folder of the student to expand the detail for that student. The description should show “The award has been disbursed to the student.” If it shows something else, this needs further research. Contact SAOSF (Scholarship Automation – Office of Student Finance) at saosf@umn.edu or Andrew Hill at 624-6043.

Q) If a batch is in “posted” status, does that mean each student has been paid?

A) It refers to the status of the batch, not the status of every student in the batch. You can drill down on the “details” tab to see why each student did or did not pay. It may take a week or two to show up in the student account. If the student does not see the award in their account after this time they should be directed to One Stop. Scholarship processors and approvers do not have access to student accounts.

Q) Does it matter when a student award is entered into PeopleSoft?

A) It is imperative to make awards in time to be included in a student’s financial aid package. The Office of Student Finance sends email notification of deadlines for student award entries into PeopleSoft. If you want to be added to the email list, contact saosf@umn.edu.

Q) What is the best way to pay a student travel award?

A) Pay as a reimbursement for expenses up to the travel award amount. If the award is going to be paying for something that the student will not have receipts for, then it should go through Scholarship Automation.

Q) What are ramifications for a student when a “prize” is awarded at the end of the year?

A) It can replace other financial aid (loans, work study, institutional gift aid, etc.) depending on what the student has already received. In the end, the student may not net any more money. If it is awarded too late, the financial aid year may be closed out or the student may be graduated. In these cases we cannot pay the students. It is always better to award prior to the beginning of the term.

Q) What is the timeline of scholarship entries into PeopleSoft?

A) There is a list of important dates at <https://asr.umn.edu/node/344> (x.500 & password required) and users are updated via listserv on a term by term basis. Contact saosf@umn.edu to be added to the listserv.

Q) Is there a way for a department to upload a spreadsheet of awards into PeopleSoft?

A) Yes. Check the Scholarship Automation Handbook at <https://asr.umn.edu/node/304#Enterers>. In step 12 there is a template you can use to enter students/awards in a spreadsheet and upload them to PeopleSoft.

Q) How do we determine when to pay a student through scholarship automation or cut a check for prize/award?

A) Basically, Prizes-Awards-Travel CashAwdTrv (800102) should be processed through the Office of Student Finance (Scholarship Automation) because if the assistance was a result of enrollment, but not a result of employment, the school must treat it as a financial aid resource.

Q) Can I delete an Item Type?

A) Yes. The Office of Student Finance is currently working on a process to allow for timely deletion of unwanted Item Types.

Additional references:

- Refer to the “Scholarship Automation” website for the handbook with details about scholarship entry into PeopleSoft and deadlines: <https://asr.umn.edu/node/304#Enterers>
- Refer to Academic Support Resources information about payments to students for details and laws that rule awarding of scholarships and awards: <https://asr.umn.edu/node/554>

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