

## Scholarship Administrators Meeting – Minutes

May 13, 2015

### Introductions

#### Financial Aid/Scholarship Updates

- Final spring award entry deadline – this Friday, May 15.
- First Summer scholarship disbursement is June 8. Entries to be done the sooner the better.
- 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 Scholarship Automation. The courses (GRAD 4999 and UGRD 4999) are set up as a placeholder for 0 credits with no tuition/fees attached to them in order to allow the Office of Student Finance (OSF) to disburse the scholarships. The Office of Student Finance will register the student(s). Students and departments will not see these courses as options for registration. The 4999 course will appear on student transcripts as summer research.
  - You must send an email to [SAOSF@umn.edu](mailto:SAOSF@umn.edu) providing the student's name, University ID, scholarship name, scholarship item type, scholarship award amount, and a brief overview of the research opportunity for an audit trail. We will then register the student(s) for Summer GRAD/UGRD 4999 and allow for disbursement of the scholarship.

#### FastStart awards / STAR updates – Peter Dahl, Natalie Ysker

- STAR bugs due to the upgrade are now fixed. Let Peter Dahl know if you are finding any issues.
- STAR shows improved scholarship funds utilization over the past years, from \$22m awarded in FY12 to \$42.6m in FY15.
- UMF sent Scholarship Management Performance reports for each college to central as part of the compact process this Spring.
- FastStart program ended – there will be no new FastStart funds created.
- Reminder to award all FastStart funds currently in process so they show as paid out by end of February.
- Summer FastStart awards are possible but must be made in the summer before the AidYear/s listed in STAR.
- UMF will reimburse FastStart chartstrings for the amounts documented in the MOAs and listed in STAR. If not awarded, the funds are lost and cannot rollover for future use.
- There was discussion of some awarding issues – contact Natalie Ysker or your development officer if any issues in awarding based on how the MOA was written.
- Discussion that it would be helpful to have a document about the FastStart program, timelines, how to handle common issues. This would be helpful as a reference that could be shared with departments that have FastStart funds. Peter said UMF could put this together.
- There is a STAR report for FastStart funds that can be run to remind those departments of the award amounts. Also remind staff with the entry role to enter their spending plans.

## **UMF Stewardship Report** – Carolyn Buzza and Marcy Joseph, UMF Marketing

- Carolyn works with annual stewardship reports to endowment donors.
  - In the past those reports included only financial data about the fund.
  - They will be adding student data for scholarship funds in the future to include name, town, and college for recipients during the last AY.
  - They will work with development offices to fill in any gaps.
  - Discussion about any concerns with this that the group may have.

## **New Scholarship Process Update** – Andy, Dianne, Paul, Nate, Bob

- We are still able to look up batches from 8.9 at OneStop > Staff Page > PeopleSoft > PS 8.9 HRMS > Financial Aid > UM Scholarships ...
- To see awards at this time for AY2015-16 you can look in STAR.
- Item Types now all default to fulltime, even those originally set up for part-time. Be sure to review the scholarship MOA in STAR to make sure that you are following the donor's guidelines for awarding. If it is OK in the MOA and you need to pay an award to a student less than fulltime, send an email to [SAOSF@umn.edu](mailto:SAOSF@umn.edu) to disburse the scholarship.
- There was discussion that combo codes associated with scholarship item types are no longer available. Michelle offered to follow up with the development team about creating such a list. She will share the outcome with RRCs.
- Changes were made to the "PeopleSoft 9.0 UM Departmental Scholarship Processes" training document on the ASR Scholarship Administrator Training page: [https://asr.umn.edu/training/scholarship\\_administrators](https://asr.umn.edu/training/scholarship_administrators)  
Users should download the latest version of the training document for helpful updates.
- UPKs have been also added in PeopleSoft under the 'Help' link for administrators to show how to process scholarships in the new system. Paul Haugen from OSF presented a brief demonstration on where to find and how to utilize the UPKs. Go try them if you want!
- Reporting Center
  - A report is being developed and is in design phase now – to see activity of scholarships entered in 9.0.
  - OSF will investigate a college DeptId rollup report.
  - Expect to have available late June/early July.
  - In the meantime, if you need to see activity in 9.0, by DeptId, email [SAOSF@umn.edu](mailto:SAOSF@umn.edu) to run a query. They will email a spreadsheet until the new report is available. It will include name, item type, description, award status, total award amt, amount disbursed.
- Scholarship Automation will be the name of the scholarship entry process as in the past.

**June 3 is the next meeting.** If there are no agenda items, the meeting will be cancelled.