

# Scholarship Management System

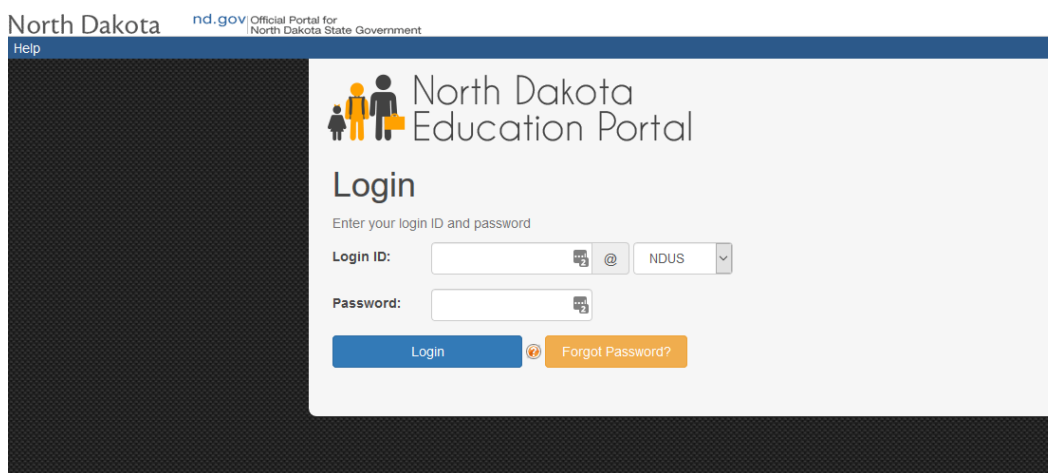
## Campus User Guide

### Table of Contents

<b>Access</b> .....	1
Roles.....	2
<b>Viewing Student Data</b> .....	2
Contact Information.....	3
Scholarship Summary Information .....	3
Term Snapshot .....	4
Statuses .....	4
Correspondence.....	5
<b>Non-NDUS Registrar Census and End of Term Reporting</b> .....	6
Spreadsheet Downloading.....	7
Spreadsheet Uploading.....	9
<b>Payment Data</b> .....	11
<b>Forecast Report</b> .....	13

### Access

To access the Scholarship Management System (SMS) visit <https://edportal.nd.gov/sms/>.



You will need to use your NDUS credentials to access the SMS site. If you have problems accessing your account or forget your username or password visit <https://helpdesk.ndus.edu/ndusaccount/> for help.

For new users, please contact Crystal Tangsrud via email ([crystal.tangsrud@ndus.edu](mailto:crystal.tangsrud@ndus.edu)) with the user's email address and position (Financial Aid or Registrar).

## Roles

Depending on your particular role you will only be able to access certain components within the SMS. Campus Users are divided into two types of users: Financial Aid and Registrar.

### **Financial Aid Components**

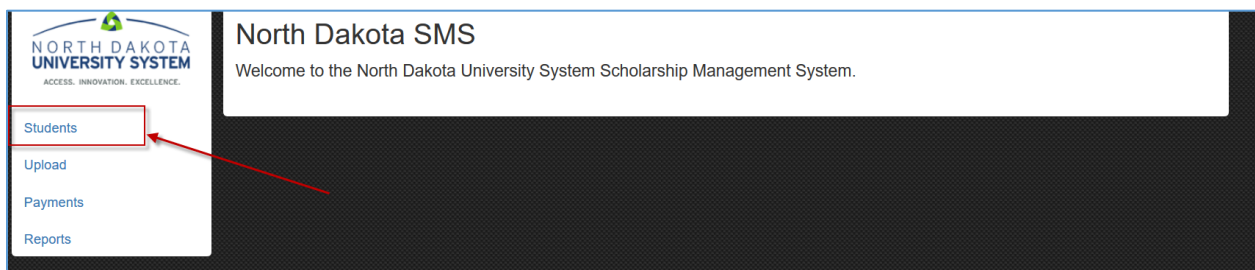
- Student
- Payments
- Reports

### **Registrar Components**

- Student
- Upload

## Viewing Student Data

To view student data in the SMS navigate to the **Student** page on the left:




Then using the **Search for Students** page you can enter information for a specific student or group of students using the standard or *Advanced Search*. This will return only students who have activity at your institution. Please note that EMPLID will can only be used for NDUS EMPLID numbers.

A screenshot of the 'Search for Students' form. The form has several input fields and dropdown menus. The fields are: 'Last Name', 'First Name', 'Social Security Number', 'Date of Birth', 'EMPLID', 'Institution' (dropdown), 'Most Recent Term' (dropdown), 'Award Type' (dropdown), 'Award Status' (dropdown), and 'Only Show Active Students' (checkbox). There is also an 'Advanced Search' link and 'Search' and 'Reset' buttons at the bottom.

Once you have completed a search click on the student's name to proceed to the **Student Page**. This page will show student specific information in the following ways.

## Contact Information

 <b>NORTH DAKOTA UNIVERSITY SYSTEM</b> ACCESS. INNOVATION. EXCELLENCE.	<b>North, Dakota</b> <a href="#">Edit</a>		
	DoB: 01/01/1901 SSN: 999999999	<a href="#">@gmail.com</a>	
<b>Students</b>	<b>Academic</b>	<b>Permanent Address</b> Bismarck, ND 58504	<b>Current Address</b> Bismarck, ND 58504

The top of the page will show you the student's basic information as it is the SMS. Should the information in this section be incorrect the student may not receive an award or notifications. If you see an error contact the NDUS Financial Aid Office to submit a change.

## Displays

- Name
- Date of Birth
- SSN
- Email Address
- Phone Number(s)
- Permanent Address
- Current Address

## Scholarship Summary Information

Career and Technical		
Cohort: 2014 First Eligible Term: 1510	High School Grad Date: 6/1/2014 Last Eligible Term: 2040	EMPLID: 185191 First Term Awarded: 1510
Academic Career Code: U Total Terms Awarded: 2 Education Program: BS	Total Amount Paid: \$750.00 Total Amount Remaining: \$5250.00	Last Term Awarded: 1510 Total Award Amount: \$6000.00

Directly below the contact information you will see a tab with the type of scholarship the student is receiving (currently only Academic or CTE). This tab will contain all of their award information on that scholarship. It is broken into two sections: static/historic and updatable/current.








### Static/Historic Data Displayed

- Cohort Year
- High School Grad Date
- EMPLID
- First Eligible Term
- Last Eligible Term
- First Term Awarded

### Updatable/Current Data Displayed

- Academic Career Code
  - G= Grad
  - U= Undergrad
- Total Amount Paid
- Last Term Awarded
- Total Terms Awarded
- Total Amount Remaining
- Total Award Amount
- Education Program

## Term Snapshot

Term	Term Code	College Code	Census Status	End of Term Status	Credits	Cumulative Credits	GPA	Payments	Returned Funds	Payment Number	Education Program	Notes	Special Exemption	Attachments
 2018 Fall	1910	UMARY	Deferred: Deferred							0		No		
 2018 Spring	1830	UMARY	Eligible: Eligible for Payment	Eligible: Eligible for Payment (First Two)	16.00	46.00	3.25	\$750.00		2		No		 
 2017 Fall	1810	UMARY	Eligible: Eligible for Payment	Eligible: Eligible for Payment	18.50		3.42	\$750.00		1		No		

On the scholarship award tab after the summary information, you find rows for each term the student has been evaluated, starting with the most recent on top. Please note that you do not have access to any of the links/icons in this section as a campus user. If click these icons you will be taken to an "Access Denied" page.

## Statuses

Status Description	Payment Eligible (Y/N)?	Notes
Accepted	Y	Incoming new student
Eligible for Payment (first two)	Y	Students who are eligible for one of their first two payments will have this status.
Eligible for Payment	Y	Students who are eligible for payments 3 or beyond could have this status.
Deferred	N	This status may be converted from the previous system or the student may have contacted the NDUS FA Office indicating they would like to defer their award. Students in this status will not be evaluated for the scholarship until they contact the NDUS FA Office indicating interest.
Not Enrolled Fulltime	N	Student is not enrolled in 12 credits or more for the term.
Not Meeting Cumulative Credits	N	Student is not meeting the minimum number of cumulative credits for their payment number. Should their cumulative hours increase they could regain their eligibility.
GPA Probation	Y	If a student is not meeting the 2.75 GPA requirement for their first term they will have this status, but are eligible to receive an award. Having this status at Census implies that the student met the fulltime enrollment and cumulative hours requirements. This status alone at End of Term (EOT) indicates cumulative hours are sufficient for their payment number.
GPA Probation & Not Enrolled Fulltime	N	Students in this status are not meeting the GPA requirement for the most recent term for which they received a payment. In addition, the student is not enrolled in at least 12 credit hours at Census for the current term. As long as they meet the GPA requirement they would be eligible to receive a payment if they enroll in sufficient hours in a future term.
GPA Probation & Not Meeting Cumulative Credits	N	Students in this status are not meeting the GPA requirement for the most recent term for which they received a payment. In addition, they have not completed sufficient cumulative credits for their payment number. Should the student continue to meeting GPA requirements and complete additional credit hours they could regain eligibility.
GPA Suspension	N	This status indicates that the student has not met the GPA requirement for the second time and is no longer eligible to receive this award.
Time Expired	N	The student's six years of eligibility has expired.
Paid in Full	N	The student has received the maximum lifetime award amount.
Time Expired & Paid in Full	N	The student's six years of eligibility has expired and has received the maximum lifetime award amount.
Deceased	N	

## Displays


- Term Description
- Term Code (Two Digit Year and term code)
  - 10= Fall
  - 20= Winter
  - 30= Spring
  - 40= Summer
- College Code
- Census Status
  - This status is updated at census but may exist prior to the census date if the student is new, transfers, or changes their status (defers or comes out of deferment).
- End of Term Status
  - This status could directly impact the following term's eligibility. This should not exist if the term has not ended.
- Credits (as of Census for that term)
- Cumulative Credits
  - Cumulative Credits are evaluated at Census and End of Term (EOT). This displays the most recently received cumulative hours.
  - GPA (Only available at the EOT)
- Payments (for that term)
- Returned Funds
  - If a student has had funds returned there will be an amount in this field.
- Payment Number
- Education Program
- Notes
- Special Exemption
- Attachments

## Correspondence

Correspondence				
Message Date	Term	Recipient Email	Sent By	Sent
6/8/2018	1830	@bismarckstate.edu	ndus\brenda.zastoupil	<input checked="" type="checkbox"/>
<div>Create Message</div>				

At the bottom of the **Student Page** there is a **Correspondence** section that will list any emails created or sent to the student within the SMS. This displays the message date, term it applies to, email address, who it was sent by, and a check mark to indicate it was sent. You can click the blue pencil in this section to view more details and view the correspondence itself by clicking the little download symbol at the bottom:

## Review


Student Name:	North, Dakota
Term:	1830
Sent By:	ndus\brenda.zastoupil
Sent:	<input checked="" type="checkbox"/>
Template Name:	ND AC-CTE Letter Renewal based on GPA 2.75 or greater.docx
File Extension:	pdf
Recipient Email:	@bismarckstate.edu
Download:	

[Return to Student](#)

### Non-NDUS Registrar Census and End of Term Reporting

NDUS institutions benefit from a direct data extract from the SLDS which houses Campus Solutions data at both Census and End of Term (EOT). This extract is conducted two business days after the NDUS FA Census Date and Special GPA Deadline during the fall/spring semesters. For both NDUS and non-NDUS institutions summer semesters are reported separately.

For non-NDUS institutions needing to report Census and EOT data, click on the **Upload** link in the left-hand navigation bar. To ensure separation of duties, **ONLY** Registrars may report required Census and EOT data.



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[Students](#)  
**[Upload](#)**  
[Payments](#)  
[Reports](#)

### Manage Uploaded Data

#### Upload a New Data File

##### Spreadsheet Upload

Please select an Excel file (.xlsx) to upload.

**Upload File Data**

**Type of Upload Data**  
☐ Census  
☐ End of Term  
Institution and term are set in the file data.

#### Spreadsheet Download

**Institution**

Select a college and term before downloading a spreadsheet template. Either template type can be used for demographics.

#### Review Pre-Staged Data

Number of open records.

	Census	End of Term
#	0	0

#### Manually Enter Student Data

## Spreadsheet Downloading

To start, download the spreadsheet for the period of time and processing type you are wanting to report (Census or End of Term). For example, if it is the Fall 2018 Census you would download a 2018 Fall (1910) Census Spreadsheet for your institution as demonstrated below:

This will download a file that includes of the students the SMS shows are eligible for an award in the prompted term at your institution. After downloading the spreadsheet, complete the required sections in **yellow**, save the document, and [upload](#) the document in the SMS.

## Census Files

Census reporting includes the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Last Name	First Name	Middle Name	SSN	Institution	Term	Cumulative Hours	Current Hours	FA Academic Career	Email Address	Address 1	Address 2	Address 3	Address 4	City	State	Postal	Phone
2	North	Dakota		999999999	UMARY	1910				dakota.north@hotmail.com	600 E Boulevard Ave				Bismarck	ND	58505	7013282906
3																		
4																		

- Last Name\*
- First Name\*
- Middle Name\*
- SSN\* (9 characters with no dashes)
- Institution\*
- Cumulative Hours – numbers only
- Current Hours (as of financial aid census) – numbers only
- FA Academic Career – one character (U= Undergraduate / G= Graduate)
- Email Address\*
- Address 1\*
- Address 2\*

- Address 3\*
- Address 4\*
- City\*
- State\*
- Postal\*
- Phone\*

\*Pre-filled rows. We recommend that when updating/changing name, SSN, or email address you notify the NDUS Financial Aid Office.

**Yellow**= required

### End of Term (EOT) Files

End of Term includes the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Last Name	First Name	Middle Name	SSN	Institution	Term	Cumulative Hours	Current GPA	FA Academic Career	Email Address	Address 1	Address 2	Address 3	Address 4	City	State	Postal	Phone
2	North	Dakota		999999999	UMARY	1910				dakota.north@hotmail.com	600 E Boulevard Ave				Bismarck	ND	58505	7013282906
3																		
4																		

- Last Name\*
- First Name\*
- Middle Name\*
- SSN\* (9 characters with no dashes)
- Institution\*
- Cumulative Hours – numbers only
- Current GPA (cumulative) – numbers only
- FA Academic Career – one character (U= Undergraduate / G= Graduate)
- Email Address\*
- Address 1\*
- Address 2\*
- Address 3\*
- Address 4\*
- City\*
- State\*
- Postal\*
- Phone\*

\*Pre-filled rows. We recommend that when updating/changing name, SSN, or email address you notify the NDUS Financial Aid Office.

**Yellow**= required



## Spreadsheet Uploading

Upload a New Data File

### Spreadsheet Upload

Please select an Excel file (.xlsx) to upload.

**Upload File Data**

Browse

**Type of Upload Data**

☐ Census   
 ☐ End of Term

Institution and term are set in the file data.

Upload

### Spreadsheet Download

**Institution**

▼

▼

Select a college and term before downloading a spreadsheet template. Either template type can be used for demographics.

Download Census Spreadsheet Download End of Term Spreadsheet

Once you have completed your spreadsheet for either Census or EOT reporting you will need to upload it into the SMS. Do this by using the **Upload** page. In the section titled **Spreadsheet Upload** click *Browse*, then select your saved Excel document. Check the radio button to indicate which type of file it is (Census or End of Term), then click the green **Upload** button.

It may take a few minutes to process the sheet but you should see the list of students on a **Process File Data** page. This page has important messages regarding errors, which will be displayed in orange if they exist. If everything looks correct click the green **Submit Data to Staging** button.

## Process File Data

File data has not yet been submitted to the database. This page gives you a chance to review how the data is extracted from the file and what will be placed into the selected staging area. When you have finished reviewing the data, click the "Submit to Stage" button at the bottom of the page.

Once data has been submitted to upload it will be loaded into the staging tables in a background process, you can view the progress of uploaded records on the Upload home page.

Rows highlighted in orange have validation errors. These can still be submitted but they will need to be reviewed and corrected before they can be processed out of the staging data.

Last Name	First Name	Middle Name	SSN	College	Term	FA Career	Cumulative Credit Hours	Email Address	Address Line 1	Address Line 2	Address Line 3	Address Line 4	City	State	Zip Code	Phone	Current Credits	Current GPA
Dakota	North		999999999	UMARY	1830	U	42	@umary.edu									12	

Submit Data to Staging

Cancel File Upload

You will then be directed to the **Pending Staged Data** page where you can once again review all of the students you submitted. You can also still make changes by checking the box next to a student and then clicking the **Delete** or **Edit** buttons. Otherwise click **Return** to go back to the **Upload** page.

## Pending Staged Data

Uploaded file data is processed into the "pending" stage data in a background process and can take a moment before it appears in this list. If you do not see all of the records that you uploaded please wait a moment and refresh the page.


Process	Last Name	First Name	SSN	College	Actions
<input type="checkbox"/>	North	Dakota	999999999	UMARY	<a href="#">Edit</a>   <a href="#">Delete</a>

Select All

Delete Selected

Return

In the unlikely event that the NDUS Financial Aid Office has not processed your Census or EOT reported data you can go and view this data in the "pre-staged" area of the **Upload** page on the right hand side by clicking the blue **Review** button. You can also make edits or delete rows on this until it has been processed by the NDUS Financial Aid Office.



Students

**Upload**

Payments

Reports

### Manage Uploaded Data

Upload a New Data File

#### Spreadsheet Upload

Please select an Excel file (.xlsx) to upload.

Upload File Data

 [Browse](#)

Type of Upload Data

☐ Census

☐ End of Term

Institution and term are set in the file data.

[Upload](#)

#### Spreadsheet Download

Institution

--- Select ---

2026 Summer (2640)

Select a college and term before downloading a spreadsheet template. Either template type can be used for demographics.

[Download Census Spreadsheet](#) [Download End of Term Spreadsheet](#)

#### Review Pre-Staged Data

Number of open records.

	Census	End of Term
#	0	0

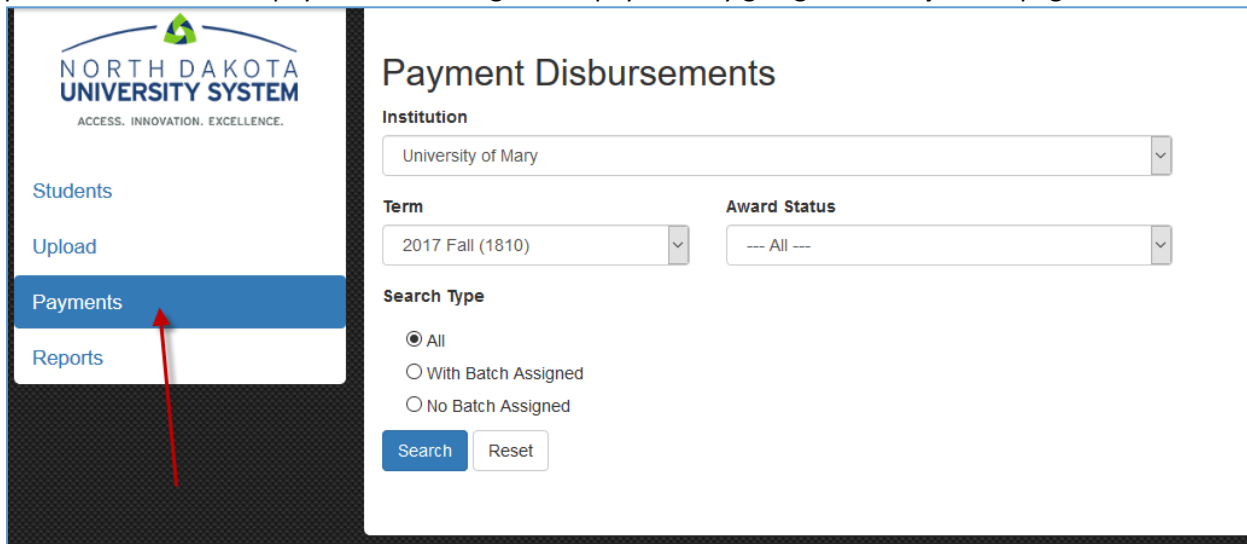
[Review](#)

#### Manually Enter Student Data

[Census](#) [End of Term](#)

## Payment Data

Directly following Census processing by the NDUS Financial Aid Office you should be able to see who passed the criteria for payment and is eligible for payment by going to the **Payments** page.



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Students  
Upload  
**Payments**  
Reports

### Payment Disbursements

**Institution**  
University of Mary

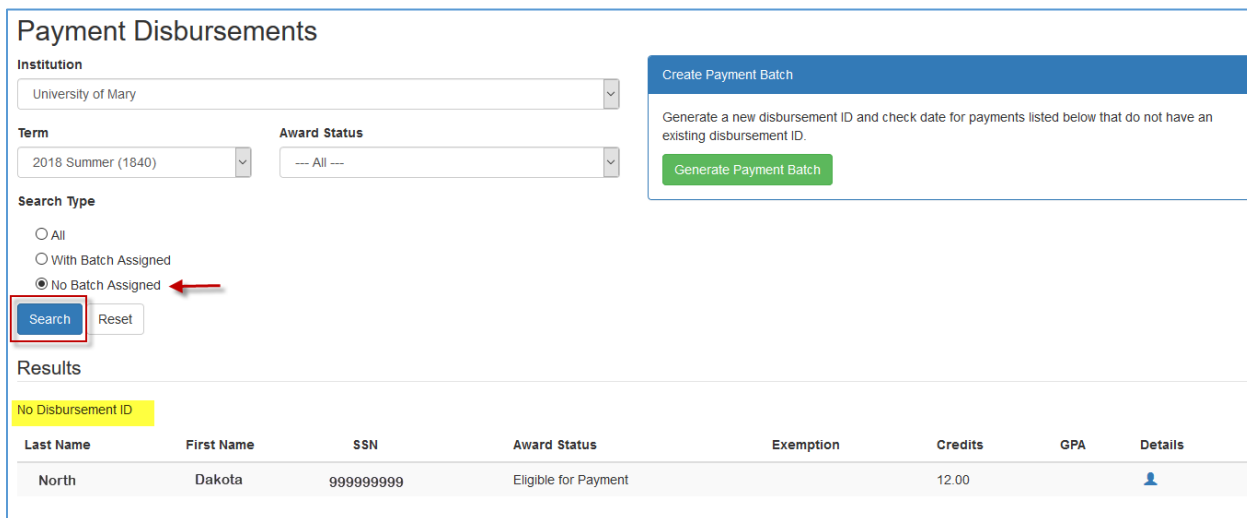
**Term**  
2017 Fall (1810)

**Award Status**  
--- All ---

**Search Type**  
☒ All  
☐ With Batch Assigned  
☐ No Batch Assigned

**Search** **Reset**

Select the term you want to review. Award Status can stay set to *All*. Early in the term you may want to keep the **Search Type** as *All* or *No Batch Assigned*, this will act like a simulation list.



### Payment Disbursements

**Institution**  
University of Mary

**Term**  
2018 Summer (1840)


**Award Status**  
--- All ---

**Search Type**  
☐ All  
☐ With Batch Assigned  
☒ No Batch Assigned

**Search** **Reset**


**Results**

No Disbursement ID

Last Name	First Name	SSN	Award Status	Exemption	Credits	GPA	Details
North	Dakota	999999999	Eligible for Payment		12.00		

Once you have reviewed your list notify the NDUS Financial Aid Office of any changes or if you are ready to receive payment.

After a payment is issued you can return to the **Payments** page and search for reports with a Batch Assigned to get the payment information for that group.



Students

**Payments**

Reports

### Payment Disbursements

**Institution**  
University of Mary

**Term**  
2018 Fall (1910)

**Award Status**  
--- All ---

**Search Type**

☐ All  
☒ With Batch Assigned  
☐ No Batch Assigned

**Results**

**Batch ID:** UMARY191010-1-2018  
**Check Date:** 10/1/2018  
[Download Report](#)

Last Name	First Name	SSN	Award Status	Exemption	Credits	GPA	Details
			Eligible for Payment		14.00		
			Eligible for Payment		15.00		

You are then able to click **Download Report** of students who received payment from that Check Date:

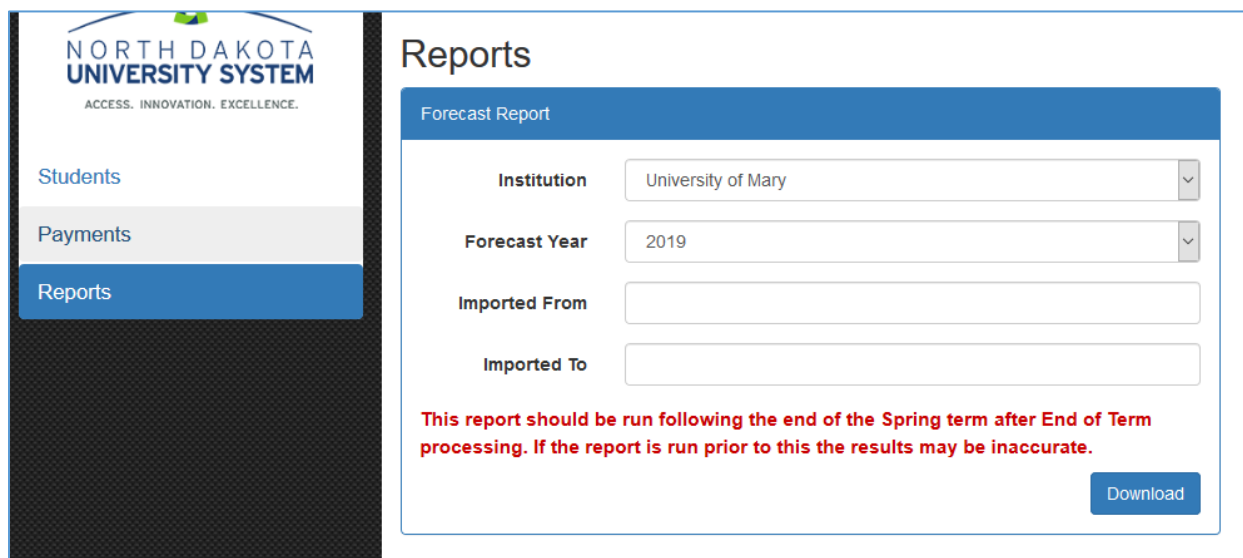
	A	B	C	D	E	F	G	H	I	J
1	<b>University of Mary</b>									
2	ND Academic and CTE Scholarship Recipients - Term 40, AY 2017-18									
3	Dollar Amount: \$1,500 per year, \$750 paid per term with renewal criteria met.									
4										
5	<b>Disbursement Date</b>	<b>Scholarship Type</b>	<b>First Name</b>	<b>Last Name</b>	<b>Middle Name</b>	<b>Social Security Number</b>	<b>College ID</b>	<b>Full-Time</b>	<b>Amount</b>	<b>Special Exemption</b>
6	8/24/2018	Career and Technical	North	Dakota		999999999		12.00	\$ 750.00	
7										
8										
9							<b>Total</b>		\$ 750.00	
10							<b>Student Count</b>		1	
11										
12										
13							<b>Grand Total</b>		\$ 750.00	
14							<b>Total Student Count</b>		1	
15										
16										

## Forecast Report

In the **Reports** section of the SMS you will find the **Forecast Report**. This report is designed to be used following Spring End of Term data has been processed by NDUS for your institution. The information it contains should be used to determine who are eligible to receive their ND Scholarships in the following aid year. If you run this prior to Spring EOT your results could be incorrect. This report replaces “renewal reports” and “freshmen reports” that were previously received in SharePoint.

We recommend running this report regularly to catch new awards. Enhancements are planned to give you more parameters for running.

To identify freshmen recipients you can sort/filter the file using the Cohort and Cumulative Paid columns. Freshmen will always be in the latest cohort and will have received \$0.



The screenshot shows the North Dakota University System (NDUS) Reports page. On the left is a navigation menu with links for Students, Payments, and Reports (which is highlighted). The main content area is titled 'Reports' and contains a 'Forecast Report' section. This section has four input fields: 'Institution' (set to 'University of Mary'), 'Forecast Year' (set to '2019'), 'Imported From' (empty), and 'Imported To' (empty). Below these fields is a red warning message: 'This report should be run following the end of the Spring term after End of Term processing. If the report is run prior to this the results may be inaccurate.' A 'Download' button is located at the bottom right of the form.

This report includes the following data:

- Last Name
- First Name
- Middle Name
- SSN
- Institution
- Scholarship Type
- Fall Amount
- Spring Amount
- FA Academic Career
- Email Address
- Address 1
- Address 2
- City
- State
- Postal
- Phone
- Cohort
- Cumulative Paid