Scholarship Administrators Meeting  
October 2, 2019

Introductions

MY FINANCES student portal demonstration – Matt Tveter
For a student’s ease, a new student portal has been designed that includes all financial data elements in one location. When a student logs into My U, on the left hand side, they will find a tab titled MY FINANCES. Under that tab, students will be able to see:

- Billing and Payment information
- Financial Aid information
- Current SAP status, along with directives to resolve unsatisfactory status
  - As a reminder, students are protected by FERPA, therefore, other depts., including OSF, cannot share information with Administrators relative to SAP.
- U of MN (only) Financial Aid history. If aid was received elsewhere, it will not be reflected on the account.
- A question mark (?) will be present by each award. The student can click on this, and view an Award Message that relates to that specific award. Departments: If you have not already updated your award messages that provide basic information about the scholarship or contact information, please consider doing so. This will expedite the student’s ability to direct their questions to the appropriate location. Contact OSF to proceed.
- Only active scholarships will be present on an account. If a scholarship has been cancelled, the entire row will be removed from display.
- This is active on all UM campuses.

The presentation is following these minutes.

CENTRAL ADVISING TRAINING INITIATIVES – Amy Hackett
Amy’s position requirements include forming a cohesive training program for academic training that includes, but not limited to:

- Events
- Workshops
- Conferences
- Case Study
- Topic specific
- Webinars

Two websites used by advisors for training are:
- Advisor.umn.edu/events
- Advisor.umn.edu

A website for students to use is
- Advising.umn.edu

The presentation is following these minutes.

Office of Student Finance Update – Michelle Curtis and Nate Rosckes
- Students could begin to submit new FAFSA’s/ISIRS on October 1 for the 2020/2021 AY. They will be using 2018 income taxes.
- We will not begin to “load” them into PeopleSoft until 10/20/2019.
- UMNCTC received 61,000 ISIRs within the first 24 hours.
• Changes to financial aid packaging for 2020/2021
  o We will not be including Parent Plus loans initially; this aligns with recommendations by the Dept. of Education. Language will be included advising of options such as parent loans, private loans, etc.
  o We may also estimate financial aid packages for continuing students (non-freshmen) in the spring. This could mean that we will want to add scholarships earlier than in the past. More to come on that later.

• The "Scholarship Management Performance" report in Reporting Center has now been updated. Administrators can now see whether their scholarships have been awarded/disbursed according to the spending plan in STAR.

Admissions Update – Jenny Malek

• Have offered admission to 1000 students for Fall 2020/2021 already.
• There are now eight colleges that students can apply for, School of Nursing has been added as a freshmen class.
• November 1 and January 1 remain the deadline dates for application
• Scholarships will be awarded beginning in October with all students being awarded by end of January.
• Data for the current class that began in fall 2019 will soon be available, but Jenny is very pleased. Board of Regents will announce first.
• Jenny also shared that NACAC, the National Association for College Admission Counseling, plans to remove provisions from their Code of Ethics in response to the Dept. of Justice allegations of Good Faith practices. UM has already been following these principles.
  o Colleges should not offer incentives for early-admission decisions
  o Colleges should cease recruiting students that have already committed to another college, both new and transfer.

Next meeting: December 4th, 1 pm at Walter Library, Room 101.
MyU: My Finances Revamp

Scholarship Administrators

October 2, 2019

Matt Tveter
Project Manager
MyU: My Finances Revamp

• Project began August 2018 and launched in June 2018

• Project team includes representation from several functional areas and all campuses.
  – Financial Aid
  – Student Finance
  – Student Records
  – One Stop
  – Institutional Analysis - MyU Portal
Alignment with goals

• Achieving Student Success
  – All degree-seeking students graduate within set time measurements
  – Every student is equipped with pertinent tools/knowledge to manage finances while in school and after graduation
  – Graduating undergraduate students are below the national debt average or $20,000 in student loans

• Enhancing systems and processes
Objectives

• Help students make informed borrowing choices by providing student-specific loan/debt information through the MyU: My Finances tab.

• Reorganize the information included on the MyU: My Finances tab.

• Ensure students can access all business processes related to Financial Aid and Student Finance through the My Finances tab.
Prior MyU: My Finances Tab

My Finances

Billing & Payment:
You have no outstanding charges at this time

Financial Aid:
- Aid Year
  - Select a year
- Campus
  - Select a campus

Questions About My Finances?
- Billing & Payment
  - Student Center
  - Dates and Deadlines - UMTC
  - Costs, Tuition, Fees - UMTC
  - How to Pay - UMTC
  - Live Like a Student - UMTC
  - 1098T Tax Form
  - Parent/Guest Access
  - Registration & Fee Summary
- Financial Aid
  - Student Loan Borrowing History
  - Scholarship Search - UMTC
  - Report Scholarships - UMTC
  - Am I Eligible for Aid? - UMTC
  - Where is My Aid? - UMTC
  - Request More Aid? - UMTC
  - Financial Aid Forms - UMTC
  - U of M Student Jobs

Need Help?
New My Finances design

- **My Billing and Payment**
  - Student Health Benefit & Reciprocity messaging
  - Link to payment plan
- **My Financial Aid**
  - Satisfactory Academic Progress messaging
  - Student-specific estimated cost of attendance
- **My Financial Aid History**
  - Sortable, exportable list of all Financial Aid received at UMN
  - Estimated remaining Pell, U Promise, and MN State Grant eligibility
My Finances

- My Finances demo
Reciprocity messaging

<table>
<thead>
<tr>
<th>Date</th>
<th>Twin Cities</th>
<th>All campuses</th>
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</thead>
<tbody>
<tr>
<td>6/17/2019</td>
<td>837</td>
<td>1,243</td>
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<tr>
<td>7/1/2019</td>
<td>776</td>
<td>1,147</td>
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<td>7/15/2019</td>
<td>693</td>
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<td>7/29/2019</td>
<td>652</td>
<td>959</td>
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<td>8/12/2019</td>
<td>414</td>
<td>619</td>
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<td>8/26/2019</td>
<td>315</td>
<td>459</td>
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<tr>
<td>9/10/2019</td>
<td>178</td>
<td>284</td>
</tr>
<tr>
<td>9/26/2019</td>
<td>64</td>
<td>119</td>
</tr>
</tbody>
</table>

Link in MyU reciprocity message % clicked link

Total 64.68%
Central Advising Training Initiatives

Amy Hackett
Director of Advising Initiatives and Coordinator of Special Scholarships
Office of Undergraduate Education
Guiding Principles

The Twin Cities Campus is committed to providing a supportive undergraduate advisor training program that aspires to be proactive, intentional, and sustainable. Training further elevates and develops the core skills advisors need to do their essential job. The Academic Advising Network additionally provides focus for advisors’ professional development.
## Central Training Initiatives: Highlights

<table>
<thead>
<tr>
<th>Events</th>
<th>Workshops</th>
<th>Conferences</th>
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<tbody>
<tr>
<td>Thank you celebration for advising community (post summer orientation)</td>
<td>Students who are first generation / low income: Delving into complex identities</td>
<td>Focusing on Student Success: A campus-wide discussion for faculty, staff, and administrators</td>
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<td>Town Hall</td>
<td>Focusing on Student Mental Health</td>
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<td></td>
<td>Focusing on Summer Orientation</td>
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Central Training Initiatives: Highlights

<table>
<thead>
<tr>
<th>Case Conversations</th>
<th>Topic Specific Sessions</th>
<th>Webinars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case study conversations on student mental health</td>
<td>An Introduction to Navigating Students with Non-dominant Identities</td>
<td>Understanding Student Food Insecurity: Issues, Impacts, and Responses</td>
</tr>
<tr>
<td>Conversations with the transfer specialists: De-mystifying the ins and outs of the transfer process</td>
<td>Navigating University Curriculum</td>
<td>Supporting First-Year, First-Generation College Students in Transition</td>
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<tr>
<td></td>
<td>Effectively Supporting Students with Disabilities</td>
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</tbody>
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2019 Central Training Events (so far!)

Half Day Workshops

• December 12: Focusing on Resilience
• End of May: Focusing on Summer Orientation

Regularly Offered

• *The View From 20,000 Feet: The Campus Advising Overview* session for new advisors
• *Case study conversations on student mental health* facilitated by Student Counseling Services
• *Conversations with the Transfer Specialists: De-mystifying the ins and outs of the change of college process*: Featuring CLA, CDES, CFANS, CCAPS
• *Financial Aid Conversations*: Featuring SAP, Financial Emergencies, General 101, and Transfer Students

Topic Specific

• *APLUS Referral System Training*
• *Boundaries and Letting Go*
• *Advising Student Veterans*

Find these and more at advisor.umn.edu/events
Central Tools and Resources

- Events Calendar & Webpage
- Advisor.umn.edu (for advisors)
- Advising.umn.edu (for students)
- Onboarding Guides
- Advisor Toolkit
- Foundational Guides: Advising Philosophy and Core Advising Skills & Methods