

Online Scholarship Application Training Guide

The Online Scholarship Application tool is a common online University application providing a more efficient process for scholarship administrators and students. Students can apply for different scholarships within the college and/or scholarships from across the University in one location by logging in with their University internet ID and password. The system is able to capture data on each student applying for scholarships (GPA, major, and more) so that students only need to answer scholarship questions. Accurate student data is displayed to the administrators who can easily sort and review application materials using the Excel exports.

Included in this document are the detailed steps required for colleges and departments to create and manage online scholarship applications for students.

This document includes training on:

- Online Scholarship Application Access
- Assigning Administrative Roles for Staff
- Creating New Scholarship Applications
- Creating/Editing Application Instructions
- Creating/Editing Questions & Headings
- Reviewing Submitted Student Applications
- Troubleshooting Student Application Issues
- Working with the Scholarship Student Selector Report
- Screen Shot Examples of Student View

For questions, or to schedule in-person training, please contact the Office of Student Finance Scholarship Unit.

- Scholarship Unit Email: saosf@umn.edu
- LuGail Hamel 612-624-6043
- Nate Rosckes 612-624-2324
- Michelle Curtis 612-626-6518



OFFICE of STUDENT FINANCE
Academic Support Resources
UNIVERSITY OF MINNESOTA

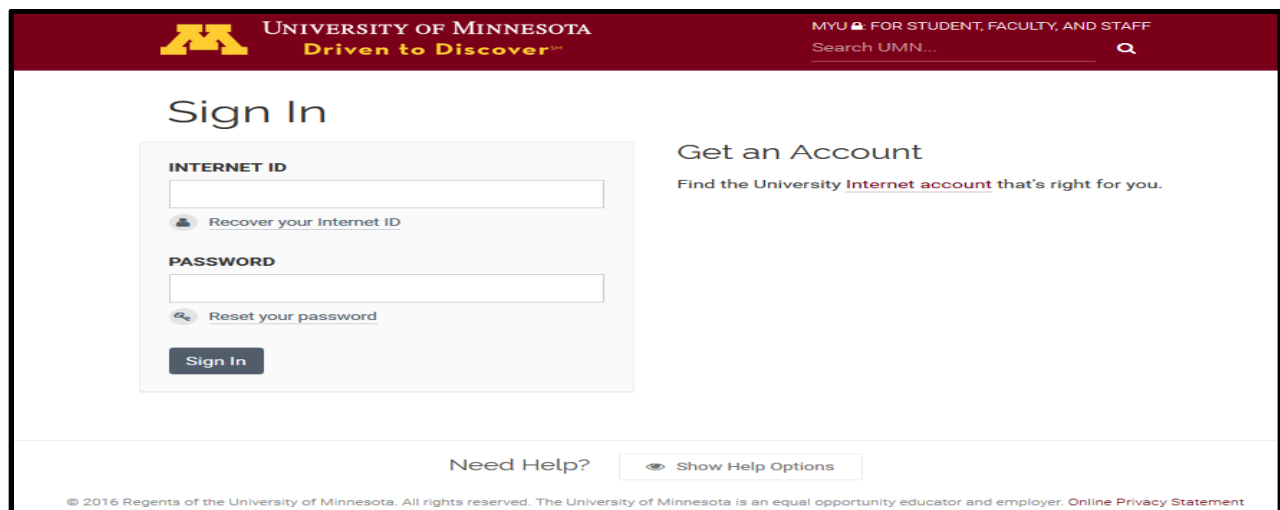
Getting Started:

Online Scholarship Application Access:

The Office of Student Finance must first set up 'Administrator' access for at least one staff member in your college. **Please email the OSF Scholarship Unit at saosf@umn.edu to request Administrator access.** Administrators then have the ability to add access for other staff members in their college.

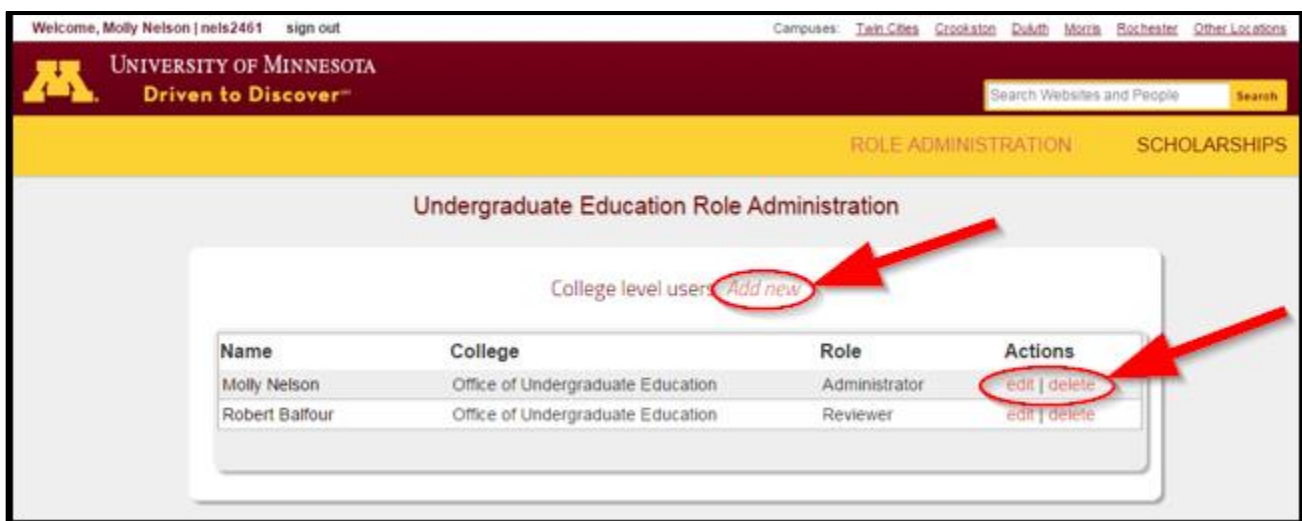
Signing In:

1. **For University staff sign in go to:** <https://onestop2.umn.edu/scholarship/admin> (copy and paste the link).
 - For best results use the preferred internet browsers Mozilla Firefox or Google Chrome (Safari also works for Mac users)
2. **For Student sign in go to:** <https://onestop2.umn.edu/scholarship>
3. Enter your Internet ID and Password to Sign In.



The image shows the 'Sign In' page of the University of Minnesota's OneStop2 system. The page has a maroon header with the University of Minnesota logo and the text 'UNIVERSITY OF MINNESOTA Driven to Discover™'. On the right, it says 'MYU FOR STUDENT, FACULTY, AND STAFF' and has a search bar. The main content area is white and titled 'Sign In'. It contains two input fields: 'INTERNET ID' and 'PASSWORD'. Below each field are links for 'Recover your Internet ID' and 'Reset your password'. A 'Sign In' button is at the bottom of the form. To the right of the form is a section titled 'Get an Account' with the text 'Find the University Internet account that's right for you.' At the bottom of the page, there is a 'Need Help?' link and a 'Show Help Options' button. A footer at the very bottom contains copyright information and a link to the 'Online Privacy Statement'.

Administrator's screen after Sign In:



The image shows the 'Undergraduate Education Role Administration' screen of the University of Minnesota's OneStop2 system. The page has a maroon header with the University of Minnesota logo and the text 'UNIVERSITY OF MINNESOTA Driven to Discover™'. On the right, it says 'Campuses: Twin Cities, Crookston, Duluth, Morris, Rochester, Other Locations' and has a search bar. Below the header is a yellow navigation bar with 'ROLE ADMINISTRATION' and 'SCHOLARSHIPS'. The main content area is white and titled 'Undergraduate Education Role Administration'. It contains a section for 'College level users' with an 'Add new' link. Below this is a table with columns for 'Name', 'College', 'Role', and 'Actions'. The table lists two users: Molly Nelson (Administrator) and Robert Balfour (Reviewer). Red arrows point to the 'Add new' link and the 'edit | delete' links in the 'Actions' column.

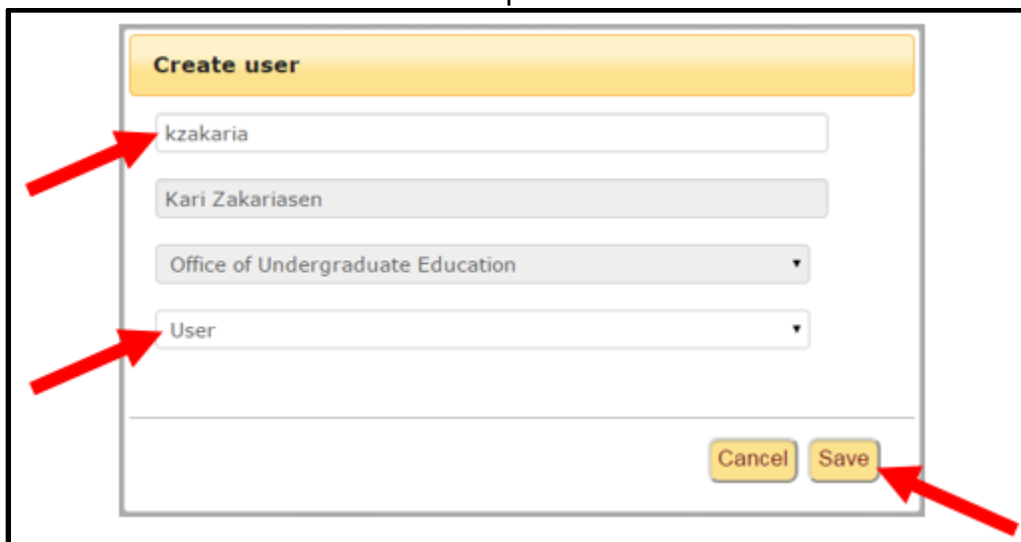
| Name | College | Role | Actions |
|----------------|-----------------------------------|---------------|---------------|
| Molly Nelson | Office of Undergraduate Education | Administrator | edit delete |
| Robert Balfour | Office of Undergraduate Education | Reviewer | edit delete |

Assigning Administrative Roles for Staff:

As an 'Administrator' you may assign roles for individual University staff in your college/unit by clicking on the 'Add new' link at the top of the page.

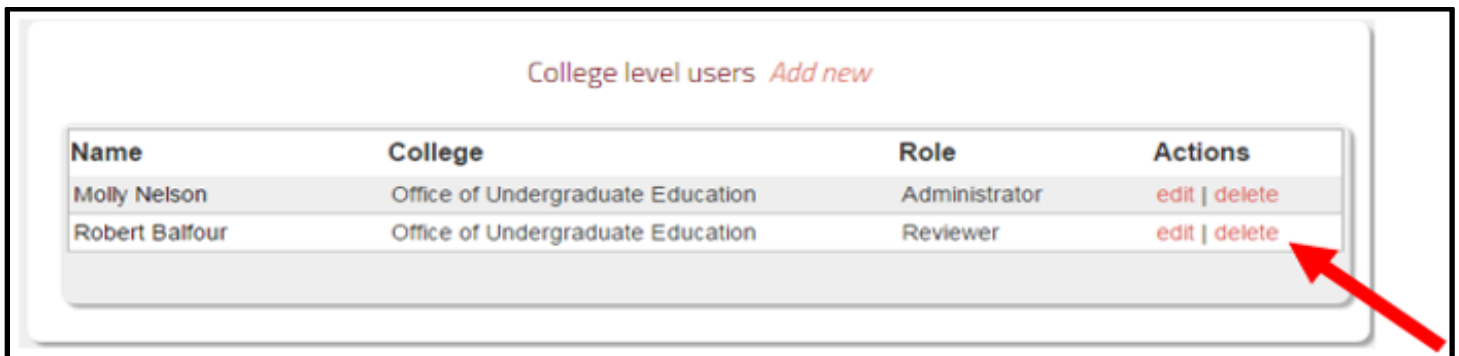
Roles Defined:

- **Administrator** role: Has access to ***all online scholarship application functions*** for the college/unit including adding/editing/deleting access roles and access to the Scholarship Student Selector (private student data). Also has ability to 'Unsubmit' and 'Delete' applications.
- **User** role: Has access to all online scholarship application functions (including Student Selector data), but ***cannot add/edit access roles*** for the college/unit.
- **Reviewer** role: Has access only to submitted student applications for the college/unit.
 - **Example:** You may use the 'Reviewer' role for faculty scholarship committee members who need to review student application questions and answers, but should not have access to private student data.



The screenshot shows a 'Create user' form with the following fields: a text input for 'kzakaria', a text input for 'Kari Zakariasen', a dropdown menu for 'Office of Undergraduate Education', and a dropdown menu for 'User'. At the bottom right are 'Cancel' and 'Save' buttons. Red arrows point to the first two text inputs, the 'User' dropdown, and the 'Save' button.

- Enter the University staff member's internet ID and tab to the next field. You should see the staff member's name populate in the second field.
- The third field should automatically select your college/unit – will not allow you to choose another.
- In the bottom field use the drop-down menu to select the appropriate role.
- Click 'Save.' You will now see the new University staff member listed on your Role Administration page.
- 'Administrators' can edit/delete access for college/unit staff at any time from this page.

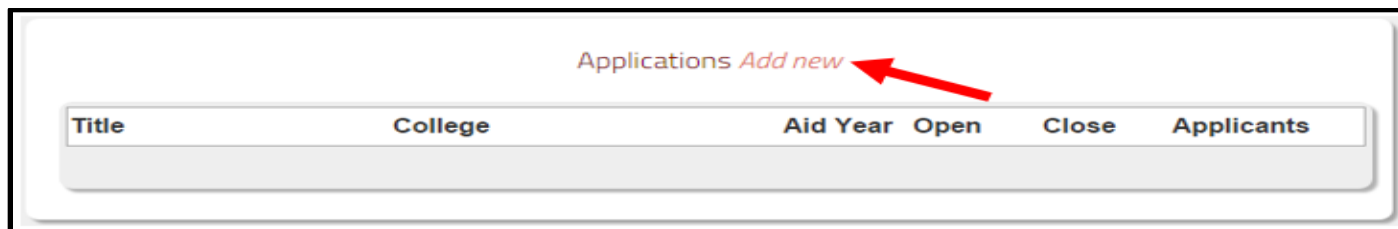


The screenshot shows a table titled 'College level users' with a link 'Add new'. The table has four columns: Name, College, Role, and Actions. It lists two users: Molly Nelson (Administrator) and Robert Balfour (Reviewer). Red arrows point to the 'Add new' link and the 'edit | delete' links in the Actions column.

| Name | College | Role | Actions |
|----------------|-----------------------------------|---------------|---------------|
| Molly Nelson | Office of Undergraduate Education | Administrator | edit delete |
| Robert Balfour | Office of Undergraduate Education | Reviewer | edit delete |

Creating an Online Scholarship Application:

1. In the Applications section on the main page, click on 'Add new' to start a new application.

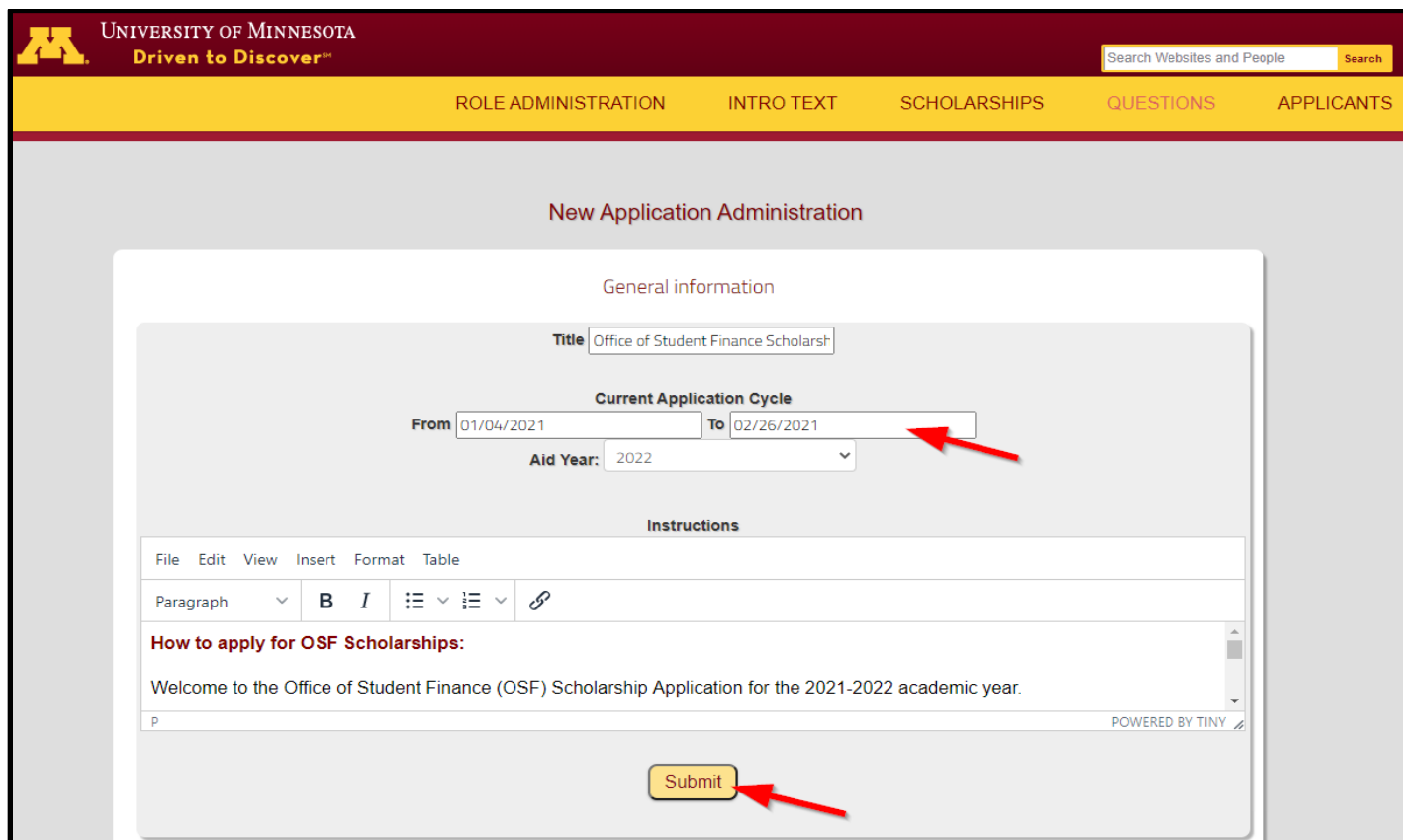


The screenshot shows a header bar for the 'Applications' section. The word 'Applications' is in red, followed by 'Add new' in red with a red arrow pointing to it. Below this is a table with columns: Title, College, Aid Year, Open, Close, and Applicants.


2. Enter a Title for your scholarship application (100 character limit).
3. Enter your 'Current Application Cycle' dates (students will only be able to access your application between the dates that you enter).
 - You will need to enter both 'From' and 'To' dates for your application.
 - **Note: If your application deadline is the 15th of a month you must enter the 16th as the end date in the system because it will shut the application down at 12:00 am on the 16th.**
4. Select the Aid Year for the application.
 - **Note: The "Aid Year 2022" is the one that begins Fall 2021 and goes through Summer 2022.**

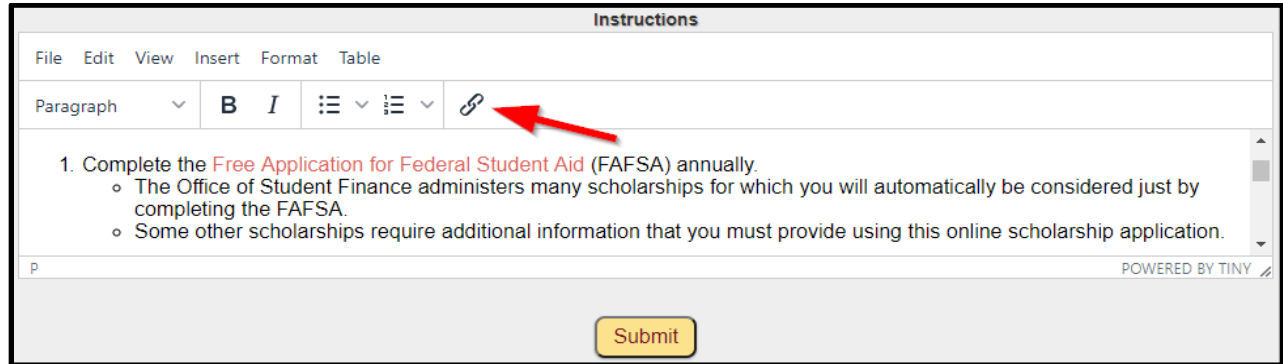
Creating/Editing Application Instructions:

1. Enter your application instructions and format them in this section. Click 'Submit' when finished. Students will see these instructions when they sign into the application prior to answering questions.



The screenshot shows the 'New Application Administration' form. It includes a header for the University of Minnesota with the logo and 'Driven to Discover' tagline. A search bar is on the right. Below the header is a navigation bar with links: ROLE ADMINISTRATION, INTRO TEXT, SCHOLARSHIPS, QUESTIONS, and APPLICANTS. The main content area is titled 'New Application Administration' and contains a 'General information' section. This section has a 'Title' field with the text 'Office of Student Finance Scholarsh'. Below this is the 'Current Application Cycle' section, which has 'From' and 'To' date fields. The 'From' field is set to '01/04/2021' and the 'To' field is set to '02/26/2021'. A red arrow points to the 'To' field. Below the date fields is an 'Aid Year' dropdown menu set to '2022'. The 'Instructions' section is a rich text editor with a toolbar showing 'File', 'Edit', 'View', 'Insert', 'Format', and 'Table'. The text in the editor reads: 'How to apply for OSF Scholarships: Welcome to the Office of Student Finance (OSF) Scholarship Application for the 2021-2022 academic year.' A red arrow points to the 'Submit' button at the bottom right of the form.

2. If entering a link to an external website, click on the “Insert/edit link” icon . The below window will pop up.
- You are able to enter the link information as you would like it to be displayed to the student.
 - Make sure the Target is always set to **New Window**. This will enable the link to open within a new window or tab without navigating the student away from the Scholarship application.



Instructions

File Edit View Insert Format Table

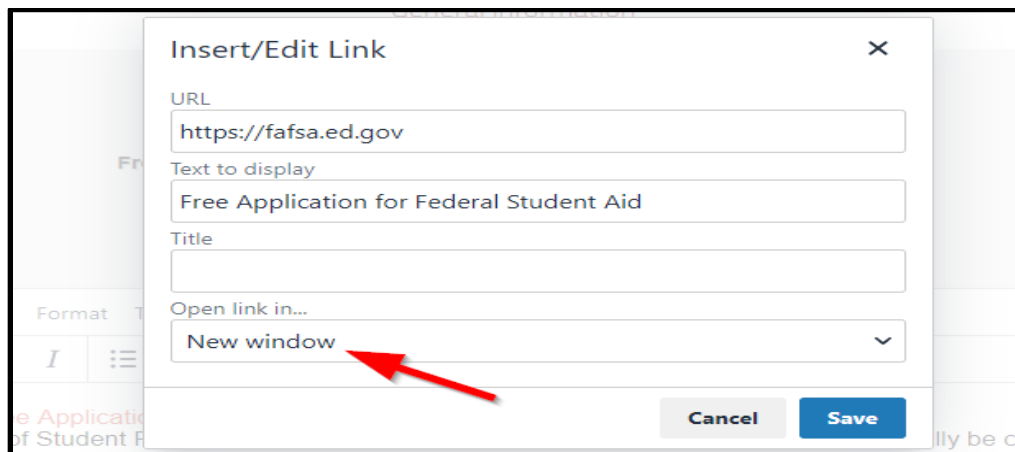
Paragraph B I [List Icon] [Link Icon]

1. Complete the **Free Application for Federal Student Aid (FAFSA)** annually.

- The Office of Student Finance administers many scholarships for which you will automatically be considered just by completing the FAFSA.
- Some other scholarships require additional information that you must provide using this online scholarship application.

POWERED BY TINY

Submit



Insert/Edit Link

URL
https://fafsa.ed.gov

Text to display
Free Application for Federal Student Aid

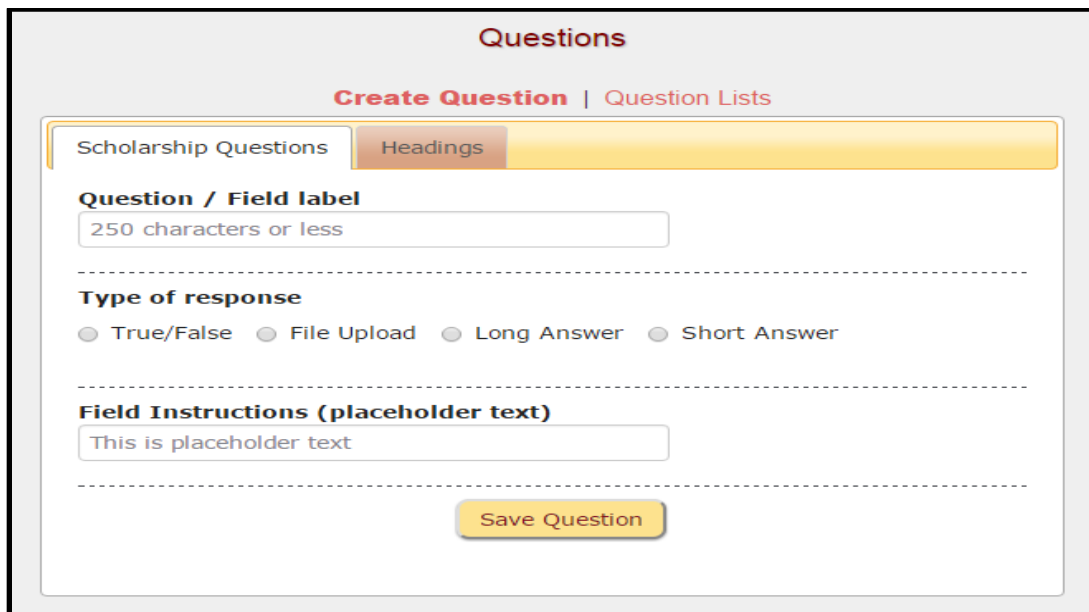
Title

Open link in...
New window

Cancel Save

Creating/Editing Questions & Headings:

1. After clicking ‘Save’ on the instructions, you may now scroll down to the ‘Questions’ section.



Questions

Create Question | Question Lists

Scholarship Questions Headings

Question / Field label
250 characters or less

Type of response
☐ True/False ☐ File Upload ☐ Long Answer ☐ Short Answer

Field Instructions (placeholder text)
This is placeholder text

Save Question

2. Enter your question text in the first field under '**Question/Field label**'.
3. Select the '**Type of response**' you want the applicant to provide.
 - **True/False** will provide a check box for the applicant to select or leave blank. The question text for this type of response should be written as an affirmative statement (e.g., 'I have Irish ancestry' or 'I am the first in my family to attend college').
 - **File Upload** allows a student to attach and submit a document with the online application (e.g., Word document, pdf, Excel spreadsheet, etc.)
 - **Long Answer** allows a student to provide a response that you may limit by the Max # of words - must also select data type (e.g., 'text').
 - **Short Answer** allows a student to provide a response that you may limit by the Max # of characters - must also select data type (e.g., 'text').

The screenshot shows a web interface titled 'Questions' with a sub-header 'Create Question | Question Lists'. Below this is a yellow bar with two tabs: 'Scholarship Questions' and 'Headings'. The 'Headings' tab is active. The form contains three main sections: 1. 'Question / Field label' with a text input field containing '250 characters or less'. 2. 'Type of response' with four radio button options: 'True/False', 'File Upload', 'Long Answer', and 'Short Answer'. 3. 'Field Instructions (placeholder text)' with a text input field containing 'This is placeholder text'. At the bottom right of the form is a yellow button labeled 'Save Question'. Four red arrows point to the 'Headings' tab, the 'Question / Field label' input, the 'Type of response' radio buttons, and the 'Save Question' button.

4. '**Field Instructions (placeholder text)**' allows the Administrator to include additional directions or clarifications pertaining to the question being asked.
 - The placeholder text will display to the students in the text box where they will enter their answer.
 - The placeholder text will disappear once the student begins typing.
 - *Note: placeholder text is not available for True/False or File Upload options.*
5. 'Save Question' – Your question will then show up in the 'Question Lists' section.

6. **'Headings'** are optional and may be used to highlight or separate sections of your application or to group related questions (e.g., 'Study Abroad Questions').
- Enter your Heading in the 'Group Heading' box and then click 'Save Heading.'
 - Heading will then appear in the 'Question Lists' in a slightly darker shade than the Questions.
 - Headings appear in bold text on the student application.

Questions

Create Question | Question Lists

Scholarship Questions | **Headings**

Headings are text that appear above a group of related questions (e.g. 'I am Norweigan'). They appear in the question lists but have no programmatic value.

Group Heading

Save Heading

'Available Fields & Questions' vs. 'Selected Fields and Questions'

1. When you create a new Question/Heading it will first appear under the 'Available Fields & Questions' column on the 'Question Lists' page. See SAMPLE list below. *Note: Headings are a slightly darker color.*

Questions

Create Question | **Question Lists**

Available Fields & Questions | **Selected Fields and Questions**

My primary parent(s) currently live(s) in Minnesota.

Experience

Please upload your current resume.

If applicable, where do you plan to Study Abroad?

Please check all that apply to you.

I have graduated from a Minnesota High School.

I plan to study abroad.

Essay Questions

Please describe why you chose to attend the University of Minnesota.

Save list

2. If you want a Question/Heading to display to students on the application you must **click and drag** the question from the 'Available Fields & Questions' column to the 'Selected Fields and Questions' column and then click '**Save list.**'
3. You may move questions/headings from one column to the other at any time. The changes are made real-time and changes are live on the student application side as soon as you click the 'Save list' button.
 - Example: You decide that you have received enough responses for a particular scholarship question and wish to remove that question from your online application. Just drag it to the left column 'Available Fields & Questions' and click 'Save list.'
4. **To edit or delete a question/heading:** First, move the question/heading to the 'Available Fields & Questions' column and click 'Save List.' In the 'Available Fields & Questions' column double-click on the question/heading you wish to edit to make changes. To remove the question from your lists click the 'Delete Question' button.

Questions

Create Question | Question Lists

Scholarship Questions | Headings

Question / Field label

Describe your career plans after college.

Type of response

☐ True/False ☐ File Upload ☒ Long Answer ☐ Short Answer

300 Text

Field Instructions (placeholder text)

This is placeholder text

Delete Question **Save Question**

SAMPLE: True/False questions will appear as below to the student.

Please check all that apply to you.

☐ I have graduated from a Minnesota High School.

☐ I plan to study abroad.

5. Once you have created an application, you may also ‘**Duplicate this Application.**’ This would be useful if you want to copy an application’s instructions and question list.
- Example: You can use this function when you are ready to open a new application cycle for the next semester or new Aid Year.

The screenshot shows the 'Application Administration' form. At the top, there is a navigation bar with tabs: 'ROLE ADMINISTRATION', 'INTRO TEXT', 'SCHOLARSHIPS', 'QUESTIONS', and 'APPLICANTS'. Below the navigation bar, the form is titled 'Application Administration'. On the right side of the form, there is a yellow button labeled 'Duplicate this Application'. A red arrow points to this button. The form contains several input fields: 'Title' (with the value 'Office of Student Finance Scholarsh'), 'Current Application Cycle' (with 'From' date '01/04/2021' and 'To' date '02/26/2021'), and 'Aid Year' (with the value '2022').

6. Once you click on ‘Duplicate this Application,’ a new scholarship application will be created with the title “CLONE of xxx.” You are now able to update/edit the Title of the application as well as the Current Application Cycle, Aid Year, Instructions, and Question lists.

The screenshot shows the 'Application Administration' form after clicking 'Duplicate this Application'. The form is titled 'Application Administration'. On the right side of the form, there is a yellow button labeled 'Duplicate this Application'. A red arrow points to the 'Title' input field, which now contains the text 'CLONE of Office of Student Finance'. The form also contains input fields for 'Current Application Cycle' (with 'From' date 'mm/dd/yyyy' and 'To' date 'mm/dd/yyyy') and 'Aid Year' (with the value '2022').

Closed Applications

1. Once the close date of the application cycles passes, the application is closed and students will no longer be able to access the application.
2. Administrators/Users/Reviewers will still be able to access the application as well as student responses.
3. There is currently not a way to archive old applications, so sorting by aid year, application dates, application title, etc. is the method to locate the desired application for review.
4. **Note:** Altering the Title (or questions/other details) of a closed application is **not best practice** in the interest of data integrity and possible internal audits.

Using the 'Delete' Action:

1. Only an 'Administrator' has the ability to completely "Delete" an entire scholarship application (including submitted student responses).

CAUTION: This action should be used only in a few specific scenarios (example included below). Generally, applications and student submissions should be saved for future reference/audit purposes.

Example: A User mistakenly duplicates a scholarship application twice. There now is an extra application with the same name that is not needed.

| Applications <i>Add new</i> | | | | | | |
|---------------------------------------|---------------------------|----------|------------|------------|------------|---------|
| Title | College | Aid Year | Open | Close | Applicants | Actions |
| Office of Student Finance Scholarship | Office of Student Finance | 2022 | 02/01/2021 | 03/31/2021 | 0 | delete |
| Office of Student Finance Scholarship | Office of Student Finance | 2022 | 02/01/2021 | 03/31/2021 | 0 | delete |

- The Administrator can click the 'delete' Action to get rid of the extra application that was created. **CAUTION: Before deleting an application, make sure to verify that there are no student applications in progress or submitted that would need to be saved for audit purposes.**

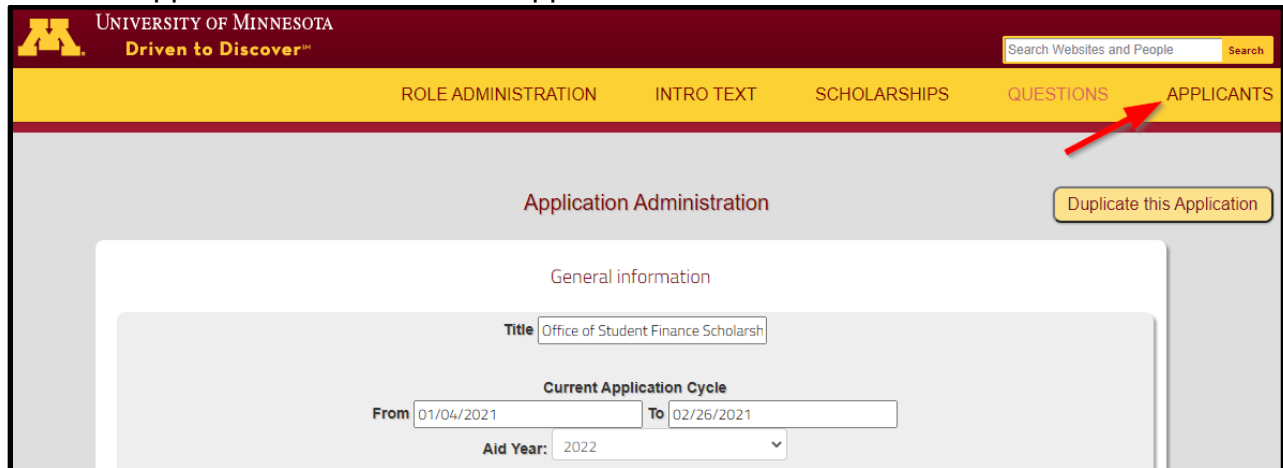
| Confirm Delete | | | | | | |
|---|-------------|----------|------|-------|------------|---------|
| Are you sure you want to delete application: Office of Student Finance Scholarship? | | | | | | |
| <input type="button" value="Yes"/> <input type="button" value="No"/> | | | | | | |
| Title | College | Aid Year | Open | Close | Applicants | Actions |
| Office of Student Finance Scholarship | Office of S | 2021 | 0 | | 0 | delete |
| Office of Student Finance Scholarship | Office of S | 2021 | 0 | | 0 | delete |
| Office of Student Finance Scholarship | Office of S | 2021 | 1 | | 1 | delete |

- A pop-up will ask if you are sure that you want to delete the application. Click Yes or No.

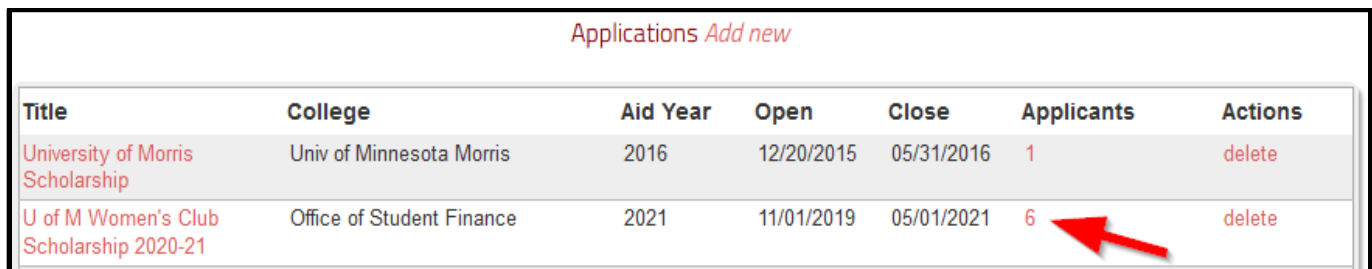
Reviewing Submitted Student Applications:

'Current Applicants'

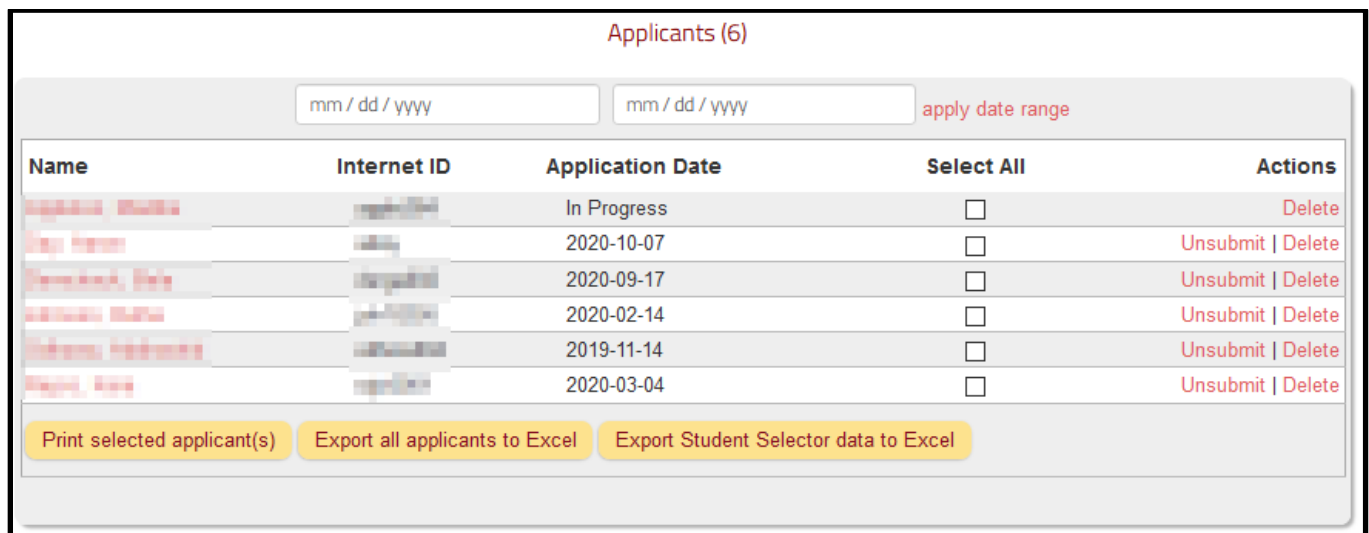
1. When on the 'Application Administration' page (click on the 'Title' to get to this page), you may click on 'Applicants' to view a list of applicants.



Or, from the main page, you may click on the number in the 'Applicants' column to view the list.



| Title | College | Aid Year | Open | Close | Applicants | Actions |
|---|---------------------------|----------|------------|------------|------------|---------|
| University of Morris Scholarship | Univ of Minnesota Morris | 2016 | 12/20/2015 | 05/31/2016 | 1 | delete |
| U of M Women's Club Scholarship 2020-21 | Office of Student Finance | 2021 | 11/01/2019 | 05/01/2021 | 6 | delete |



| Name | Internet ID | Application Date | Select All | Actions |
|---------------------|-------------|------------------|--------------------------|-------------------|
| Applicant, Multiple | applicant | In Progress | <input type="checkbox"/> | Delete |
| Applicant, Multiple | applicant | 2020-10-07 | <input type="checkbox"/> | Unsubmit Delete |
| Applicant, Multiple | applicant | 2020-09-17 | <input type="checkbox"/> | Unsubmit Delete |
| Applicant, Multiple | applicant | 2020-02-14 | <input type="checkbox"/> | Unsubmit Delete |
| Applicant, Multiple | applicant | 2019-11-14 | <input type="checkbox"/> | Unsubmit Delete |
| Applicant, Multiple | applicant | 2020-03-04 | <input type="checkbox"/> | Unsubmit Delete |

Print selected applicant(s) Export all applicants to Excel Export Student Selector data to Excel

2. Columns are sortable. **Example:** Click on the column title 'Name' to sort applications alphabetically by student, or 'Application Date' to sort by the date submitted.

3. You may also “apply date range” to applicants.

Applicants (5)

12/01/2020 mm/dd/yyyy apply date range

| Name | Application Date | Select All | Actions |
|------------|------------------|-------------------------------------|-------------------|
| [Redacted] | 0-07 | <input checked="" type="checkbox"/> | Unsubmit Delete |
| [Redacted] | 9-17 | <input type="checkbox"/> | Unsubmit Delete |
| [Redacted] | 2-14 | <input type="checkbox"/> | Unsubmit Delete |
| [Redacted] | 1-14 | <input type="checkbox"/> | Unsubmit Delete |
| [Redacted] | Press | <input type="checkbox"/> | Delete |

December 2020

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | | |

Print selected applicant(s)

- Note Regarding Applicants in Date Range:** If you click on the selection box for an applicant and then apply a date range, the applicant with the check box selected will still show when viewing/printing applications regardless if he/she is inside the selected date range. To ensure viewing/printing of only applicants within a selected date range, make sure to “unselect all” before applying a date range and then selecting applicants to view or print.
- To view individual applications click on the student’s name to view a summary of the submitted application.
- From this view you may print the application and also open any files attached by the applicant.

Applicants (1)

mm/dd/yyyy mm/dd/yyyy apply date range

| Name | Internet ID | Application Date | Select All | Actions |
|------------|-------------|------------------|--------------------------|-------------------|
| [Redacted] | schie714 | 2021-01-05 | <input type="checkbox"/> | Unsubmit Delete |

Print selected applicant(s)

Print | Close

Cumulative GPA: 3.769 Cumulative Credits: 32
Major(s): Undeclared

Responses

Briefly describe your career goals and plans after completing your undergraduate degree.

I wish to pursue a career in elementary education.

Please upload your resume here.

Student Resume Document.docx

7. You may view and/or print multiple applications at the same time by selecting multiple applications in the far right column and clicking the 'Print selected applicant(s)' button.

Applicants (5)

mm/dd/yyyy

mm/dd/yyyy

apply date range

| Name | Internet ID | Application Date | Select All | Actions |
|-------------------|-------------|------------------|-------------------------------------|-------------------|
| Copy Isomov | isomov | 2020-10-07 | <input checked="" type="checkbox"/> | Unsubmit Delete |
| Constanina, Irena | isomov | 2020-09-17 | <input checked="" type="checkbox"/> | Unsubmit Delete |
| Isomov, Irena | isomov | 2020-02-14 | <input type="checkbox"/> | Unsubmit Delete |
| Constanina, Irena | isomov | 2019-11-14 | <input type="checkbox"/> | Unsubmit Delete |
| Isomov, Irena | isomov | In Progress | <input checked="" type="checkbox"/> | Delete |

Print selected applicant(s)

Export all applicants to Excel

Export Student Selector data to Excel

8. To download the applications to an Excel spreadsheet click the 'Export all applicant(s) to Excel' button.
- Note: The Excel export will include all questions and answers from all applications including links to attached files. The export will allow staff to sort/filter the data in Excel to make it easier to work with.

| | A | B | C | D | E | F | G |
|---|----|-------|-----------|------------|---|------------------|---|
| | | | | First Name | Describe your activities and involvement in the Ukrainian community | Application Date | Attach documentation that verifies your Ukrainian descent (e.g., copy of passport, birth certificate, etc.) |
| 1 | ID | Email | Last Name | | | | |
| 2 | | | | | My Ukrainian community is my famil | 06/28/2015 | Download file |
| 3 | | | | | When my father moved from Kiev, U | 06/09/2015 | Download file |
| 4 | | | | | My family has always been heavily ir | 06/23/2015 | Download file |
| 5 | | | | | I often hear stories from my parer | 07/01/2015 | Download file |

9. Only 'Administrators' and 'Users' will have access to the third button, 'Export Student Selector data to Excel' on current aid year applications.
- Note:** This is the same information as you find in the 'Scholarship Student Selector' in the STAR system, except **this report will default sort by student last name rather than financial need.**
 - Note:** The Scholarship Student Selector data **will not be available for past aid years.** If you need to save this data for future reference/audit purposes you should save the spreadsheet to your secured drive.
10. 'Reviewers' will only have access to view/print the student applications per FERPA guidelines.

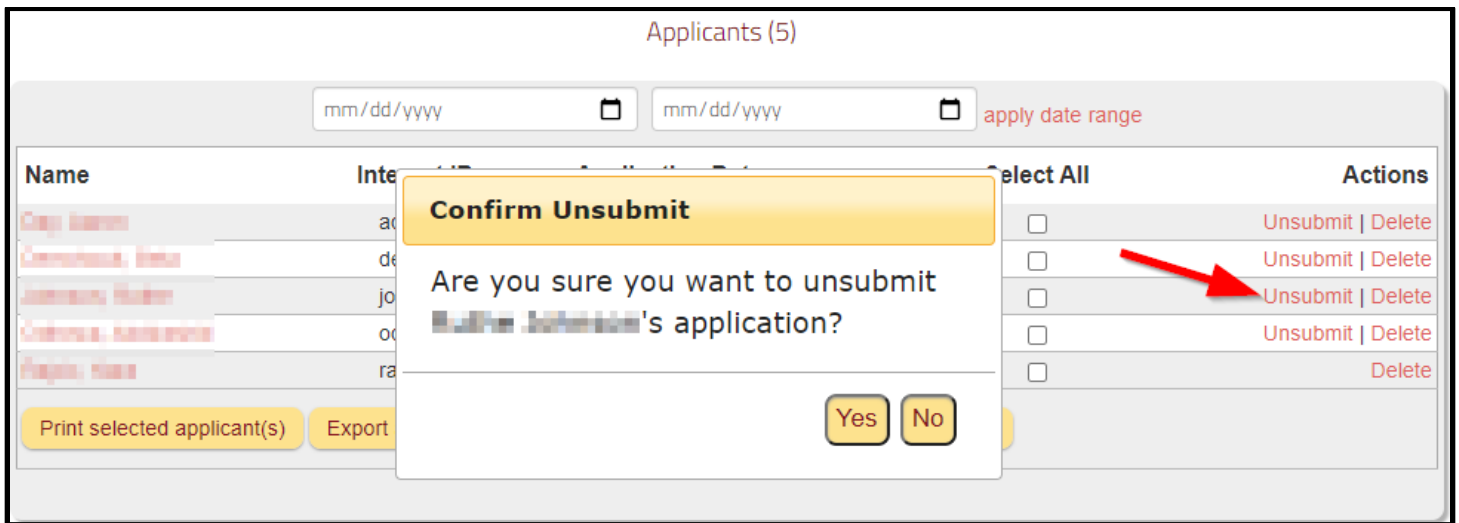
Troubleshooting Individual Student Issues:

Using the 'Unsubmit' Action:

1. An 'Administrator' has the ability to re-open an application for a student after it has been submitted.

Example 1: A student submitted an application, but realized that they mistakenly skipped a question.

- The Administrator in charge of the application can click "Unsubmit" to open up the application.
- The student would then be able to access their application, complete the missed question, and re-submit.



Example 2: A student submitted an application, but the Admin/User wants the student to provide more information or clarify a given response.

- The Administrator in charge of the application can click "Unsubmit" to open up the application.
- The student would then be able to access their application, provide the additional information requested, and re-submit.

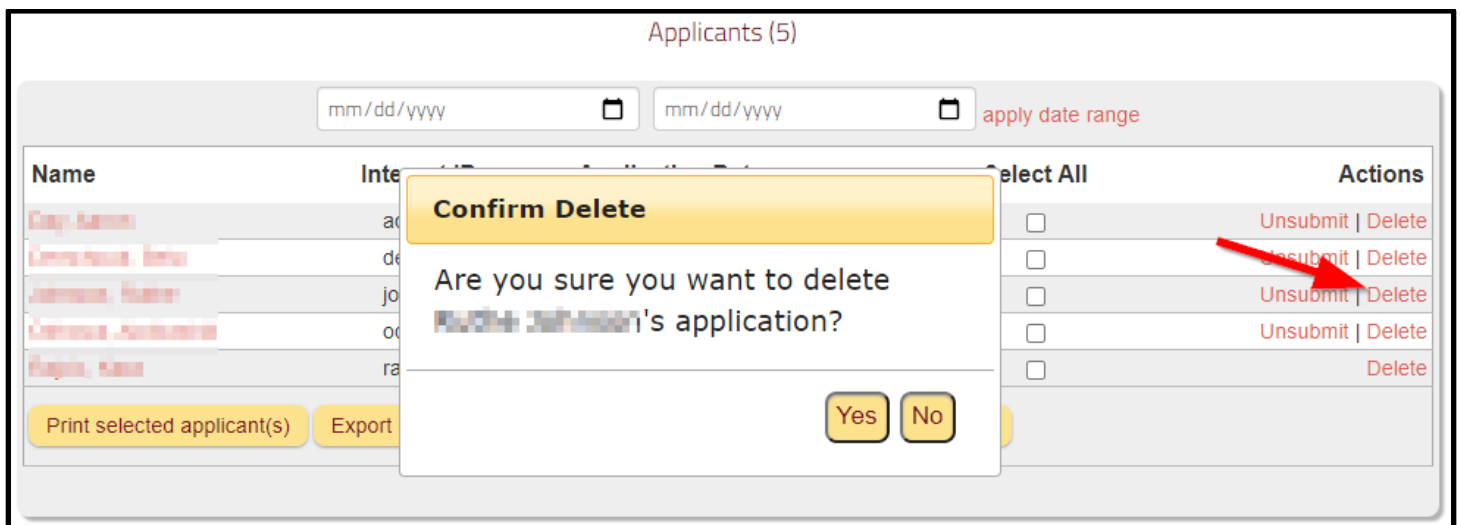
Using the 'Delete' Action:

2. An 'Administrator' has the ability to completely "Delete" an application for a student after it has been submitted.

CAUTION: This action should be used only in a few specific scenarios (examples included below). Generally, submitted applications should be saved for future reference/audit purposes.

Example 1: A student submitted an application, but realized that they uploaded the wrong file in error.

- The only way for a new file to be uploaded is for the Administrator to click "Delete" to have the student completely start over with their application. **Tip:** Before deleting an application, check that the student has a copy of their other answers submitted (essay questions, etc.) so they don't have to retype all of their answers when they re-start the application.
- The student would then be able to start over with the application, upload the correct file(s), complete any other questions, and re-submit.



Example 2: You have a work study student in your department sign in to "test" your application to review the questions and see how things work (Administrators/Users cannot see the student view of an application because the system identifies them as University staff/faculty at login).

- The student subsequently wishes to apply for the scholarship when your application is officially open.
- The Administrator may click "Delete" to clear out the "test" application, and allow the student to complete an official application.

Working with the Scholarship Student Selector Report:

Column Definitions on Excel Spreadsheet for Student Selector:

1. **Emplid** – Student's PeopleSoft ID.
2. **Name** – Student's name.
3. **Aid Year** – The Federal Financial Aid year you have selected to award your scholarships.
This may be either the current year or the next Financial Aid Year.
4. **Process Status** – This field shows whether the student has a completed financial aid application on file. Use the value 'Completed' when awarding Need-Based scholarships.
 - * 'No App Rcd' – the student did not complete the Free Application for Federal Student Aid (FAFSA).
 - * 'Applied' – the student's application (FAFSA) has been received but not processed.
 - * 'Review' – the student's application (FAFSA) has been received but additional information has been requested to complete the application.
 - * 'Package' - the student has been offered financial aid
 - * 'Completed' – means the student has a FAFSA on file and has been offered financial aid for the academic year
5. **FAFSA** (Free Application for Federal Student Aid) **Date** – The date the financial aid application was received by the Office of Student Finance. This field can be used to determine the order in which students applied for financial aid.
6. **Cost of Attendance** – Standard cost of attendance as determined by the Office of Student Finance. If the student did not apply for financial aid via the FAFSA the Cost of the Attendance value displayed will be '0' or blank.
7. **Expected Family Cont** – This is the amount that the family is expected to contribution to the student's education as determined by the Federal Need Analysis formula from the FAFSA.
8. **Grants/Schol** – The total of all grants and scholarships awarded to the student.
9. **Need Before Work/Loan** – The value will be the dollar amount of need the student has after subtracting the student's GRANTS/SCHOL and EXPECT FAMILY CONT from the COST OF ATTENDANCE. If the resulting calculation is less than zero the value displayed will be zero. The spreadsheet is sorted in the descending order of NEED BEFORE WORK/LOAN (e.g. the highest need students are at the top). Note that out of state students have higher need because their cost of attendance is higher. As a result they will tend to be at the top.
10. **Dependency** – Dependency status determined by the FAFSA. The values displayed will be either 'D' for dependent or 'I' for independent if the student has completed a FAFSA and has been packaged. An 'X' or 'Y' in this column indicates that the student filed a FAFSA, but that their FAFSA application was not accepted (student needs to correct some piece of information before they can be package for financial aid). If the value displayed is 'Did not apply' that means the student has not filled out a FAFSA.
11. **Career** – Undergrad, Graduate, Law, Medicine, Dental, Pharmacy or Veterinary Medicine.
12. **Program** – The student's college of enrollment. If the student is enrolled in more than one college he or she will appear more than once.
13. **Plan** – The student's major. If the student has more than one major he or she will have a second row for the additional program plan(s).

14. **Plan Type** - Identifies student's PLAN as a major, minor, non-degree, pre-major (undeclared), certificate program, etc.
15. **Sub Plan** – Depending on the student's Program and Plan this field may provide additional Information useful in awarding a scholarship.
16. **Acad Level** – (e.g. Freshman, Sophomore ...)
17. **Credit Load** – The number of credits that the student has registered for during the current term (from the Office of the Registrar's (OTR panels). This value is taken from the UNTS_TAKEN_PRGRSS field in PeopleSoft.
18. **Cumulative GPA** – The student's current Cumulative GPA from the OTR panels on PeopleSoft.
19. **Total Credits** - Total credits passed from the OTR panels. This value is taken from the TOTAL_PASSD_PRGRSS field in PeopleSoft.
20. **Admit Term** – The term that the student was admitted to the Program and Plan listed on the row. Students with multiple Programs or Plans may have more than one Admit Term.
21. **Admit Type** – The student's admission type (e.g. NHS, IUT, NAS...)
22. **Last Enrolled Term** – The last term during which the student enrolled for classes.
23. **Last Reg Status** – The student's Admit Type during his or her last term of enrollment.
24. **FERPA** - The student selected level of data privacy. Do not give out information that the student has requested to not be disclosed.
25. **Prog Status** – This field indicates the student's program status (e.g. Admitted, Active, Prematric, etc.).
26. **Prog Action** - This field is used as an indicator for where the student stands in the process of matriculation (e.g., ACTV, ADMT, MATR, RLOA, PLNC...).
27. **Honors** – Indicates whether the student is in the University Honors program.
28. **Gender** - Male or Female.
29. **Residency** – The student state of residency from the ADMISSION_RES field in PeopleSoft.
30. **Citizenship** – Citizenship status of the student from PeopleSoft.
31. **Ethnicity** – The student's self-reported ethnicity from PeopleSoft.
32. **Age** – Age of the student.
33. **Last School** – The student's school prior to attending the University. For new freshmen this is typically the student's High School of graduation. For continuing or graduate students this may be a college within or outside of the University.
39. **Home City** – Home city from the address file in PeopleSoft.
40. **Home County** - Home County.
41. **Home State** – Home state from the address file in PeopleSoft.
42. **Home Country** -- Home country from the address file in PeopleSoft.
43. **Home Zip Code** – Zip code or foreign country postal code in PeopleSoft.
44. **Self Reported State** - The student's self-reported state of residence.
45. **Email Address** – Student's University email address.

Working with the Scholarship Student Selector Report (cont):

Business Rules:

Filtering a list means displaying only a part of it. You provide the criteria you want used, and then Excel displays only those list records that match the criteria. Filtering is especially useful if you have a large list and you want to work with only a subset of the records in the list.

The easiest way to filter your list is to use the AutoFilter feature. You do this by following these steps:

1. Selecting any cell in your list.
2. Choose Filter from the Data menu. Excel displays a submenu.
3. Select AutoFilter from the submenu. Excel determines where your column (field) labels are located and adds pull-down arrows to the right side of each label's cell.

AutoFilter is now alive and well in your workbook. If you click on one of these pull-down arrows, Excel displays the unique values in that column (field). You can then select one of the values and Excel displays only those records that match that value for that field. (The pull-down arrow then turns blue.) All the rest of the records in the list will be hidden.

Tips for Awarding Need-Based Scholarships:

The spreadsheet is setup with filters that you can use to select a specific group of student based on the values found in the column. For instance if you were awarding a scholarship that requires that the student show Need first determine if the student applied for aid and has been awarded aid by the Office of Student Finance.

To make this determination, select the 'Completed' from the Process Status drop-down list. A 'Completed' status means that the student has been awarded financial aid. Other statuses such as 'Review' or 'Applied' mean that the student has not yet been awarded financial aid. 'No App Rcd' or a blank field indicates that the student did not apply for financial aid.

Note that a date will appear in the FAFSA Date column if a student has completed an application for financial. You can use this date to determine when the student applied for financial aid.

There are four columns in the spreadsheet that will tell you if a student has need as determined by the Office of Student Finance. The columns are 'Cost of Attendance, Expect Family Cont', Grants/Schol' and 'Need before Work/Loan.' The spreadsheet has been sorted to list students with the greatest amount of need and who have been awarded financial aid at the top of the spreadsheet.

The formula used to determine financial need is:

$$\begin{array}{r} \text{Cost of Attendance minus} \\ - \text{Expect Family Cont} \\ - \text{Grants/Schol} \\ \hline = \text{Need before Work/Loan} \end{array}$$

If a student's Expect Family Cont is greater than Cost of Attendance then the student has No Need.

Cost of Attendance is a student budget established by the Office of Student Finance for the current year. Note that non-resident students tend to have a higher Need before Work/Loan amount because they have a higher cost of attendance as a result of paying non-resident tuition.

Expect Family Cont is the amount that the Federal government expects the family to contribute to the student's education for this year.

Grants/Schol is the total of all grants or scholarships awarded to the student to date for this year.

Need before Work/Loan (or unmet need) is the amount of scholarship money that the student may receive without affecting the student's other grant or scholarship awards. If a student receives awards beyond this amount loan or work awards may have to be reduced. If you intend to award an amount greater than the Need before Work/Loan amount consult with the Scholarship Staff in the Office of Student Finance to determine the impact on the student's other awards.

Note About Student Selector Excel Export: The Excel export displays student names in one column ('Last Name, First Name') for the Student Selector and in two separate columns ('Last Name and First Name) in the Student Applicant questions download. Administrators should be able to sort each list by 'Last Name' if desired.

Screen Shot Examples of Student View - FYI:

1. The student will sign in at: <https://onestop2.umn.edu/scholarship>
 - For best results use the preferred internet browsers Mozilla Firefox or Google Chrome (Safari also works for Mac users)
 - They will see the general instructions page, created by the Office of Student Finance when they initially log in. Student will click 'Yes, let's begin...' to go to the list of available scholarship applications.

The screenshot shows the 'University of Minnesota Online Scholarship Application' page. At the top, there is a navigation bar with the University of Minnesota logo and name, a search bar, and links for 'sign out' and various campuses. Below this, a yellow banner reads 'University of Minnesota Online Scholarship Application'. The main content area is titled 'Welcome to the University of Minnesota's Online Scholarship Application.' and includes a paragraph explaining the purpose of the site. It then lists 'How to Apply' with several bullet points detailing the application process. Below this, a 'Tips' section provides additional guidance. At the bottom of the page, there is a yellow button labeled 'Yes, let's begin...' with a red arrow pointing to it.

Welcome, Josh sign out

Campuses: [Twin Cities](#) [Crookston](#) [Duluth](#) [Morris](#) [Rochester](#) [Other Locations](#)

UNIVERSITY OF MINNESOTA
Driven to Discover™

Search Websites and People

University of Minnesota Online Scholarship Application

Josh

Welcome to the University of Minnesota's Online Scholarship Application.

As a student enrolled at the University of Minnesota this website provides you the opportunity to apply for scholarships administered by your college and/or your department as well as for general scholarships administered by other offices within the University.


How to Apply:

- Click on "Yes, let's begin" at the bottom of this page to be directed to a list of available scholarships by your college, department, and other offices with the University.
- You will be able to navigate back to this main page by clicking on "Instructions and Tips."
- Open applications will have a green check with "Apply Now" in the status column. Note: you will not be able to review/apply for closed applications.
- Click on the title of the application or "Apply Now" to review important information about application deadlines, awarding timelines, eligibility requirements, and contact information.
- If you determine that you meet the eligibility requirements, answer the questions and/or submit the information requested in the application.
- Your answers are saved if you leave the application before clicking continue or submit.
- When you click "Continue Application" you will have the opportunity to review your responses and make changes before you officially "Submit" your application. You will also have the ability to "Print" your application responses.
- Once submitted, you will receive a confirmation message. You will no longer be able to review the scholarship information and your responses.
- Please contact your college/department if you have any questions.

Tips:

- Pay attention to deadlines. Applications will no longer be available after the "Close Date" on the Scholarship List.
- Make sure you review the eligibility requirements prior to submitting your application – some of the questions may pertain to specific scholarships that only a narrow number of applicants may be eligible for.
- Review all of your answers in detail before submitting – once submitted your information is final.
- Create/update your resume – you may be asked to upload a copy for some scholarships.
- Contact your college or department with questions about the application process.

2. The student will see a list of available open applications.
- They can also navigate back to the initial screen by clicking on 'Instructions and Tips.'
 - They can review or apply for an application by either clicking on the title or 'Apply now.'
 - **Note:** The student will no longer see a scholarship on this list if it is after the application close date.

 UNIVERSITY OF MINNESOTA
Driven to Discover™

Search Websites and People Search


University of Minnesota Online Scholarship Application

Josh [REDACTED] | [REDACTED]

[Instructions and Tips](#)

| Title | College | Status | Aid Year | Close date |
|---|----------------------------|-----------------------------|----------|------------|
| CLA Scholarship Application | College of Liberal Arts-TC | ✓ Apply now | 2022 | 08/12/2021 |
| U of M Women's Club Scholarship 2021-2022 | Office of Student Finance | ✓ Apply now | 2022 | 05/01/2021 |
| Office of Student Finance Scholarship | Office of Student Finance | ✓ Apply now | 2022 | 02/26/2021 |

3. Once they click on an application, they will see the title and instructions you created for your application followed by the headings/questions you selected for the application.

 UNIVERSITY OF MINNESOTA
Driven to Discover™

Search Websites and People

Search

University of Minnesota Online Scholarship Application

Josh [REDACTED]

[Instructions and Tips](#) | [Scholarship List](#)

Office of Student Finance Scholarship

How to apply for OSF Scholarships:

Welcome to the Office of Student Finance (OSF) Scholarship Application for the 2020-2021 academic year.

1. Complete the [Free Application for Federal Student Aid \(FAFSA\)](#) annually.
 - The Office of Student Finance administers many scholarships for which you will automatically be considered just by completing the FAFSA.
 - Some other scholarships require additional information that you must provide using this online scholarship application.
2. Some OSF scholarships have very specific criteria. The questions on this application will help determine whether you qualify for such awards. *Not all questions will pertain to you - answer only those that apply.* Pay close attention to the headings - if you answer one question under a heading, you will need to answer all questions listed under that heading. If you have applied for the LaVerne Noyes and Granovsky scholarships in years past, you do not have to attach the required documentation that you have previously submitted - please indicate you have previously applied in one of your answers.
3. In order to be eligible for OSF scholarships you must be registered full-time each semester in a degree program at the University of Minnesota-Twin Cities, have financial need as determined by the FAFSA, maintain satisfactory academic progress, and meet all other financial aid eligibility criteria.
 - For more information regarding financial aid eligibility criteria visit the [One Stop website](#).
 - Note: OSF scholarships are awarded for fall/spring only – no summer scholarships

Important Information:

- If you are selected as a recipient of a scholarship from OSF you will receive an electronic financial aid award notice (eFAAN) that includes your scholarship.
- The number of scholarship awards and amounts vary based on donor guidelines and available funds.
- For more information on the scholarships awarded by OSF please visit: [Scholarships](#)

Briefly describe your career goals and plans after completing your undergraduate degree.

0 of 250 characters used

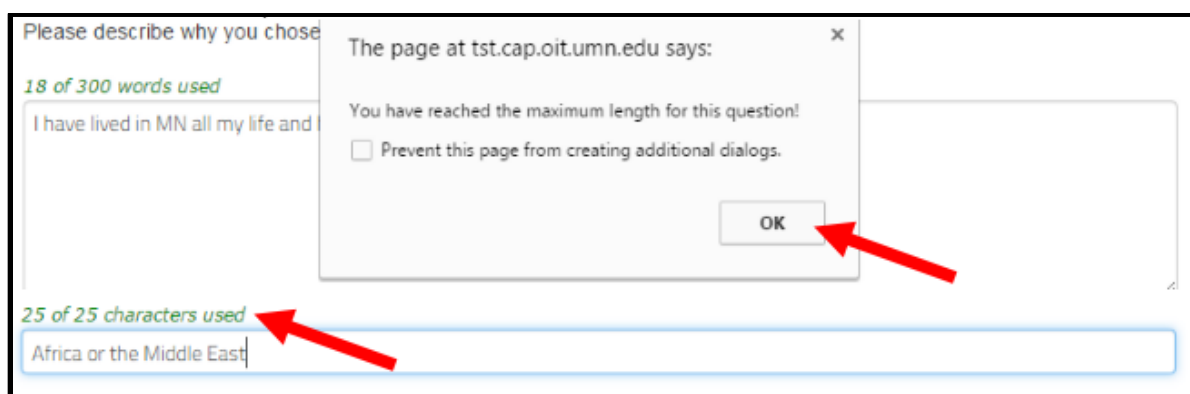
Please upload your resume here.

Choose File No file chosen

You may only upload 1 file for each statement. Combine all of your documents into 1 file prior to upload.

Continue application

4. The student will answer the questions that apply to them. If they reach the limit on the amount of characters/words in their question, they will receive a warning message (the system will not allow them to type more than the limit):



5. Once the student answers the questions and clicks on 'Continue application' they will be able to review/print their responses prior to submitting the application.
- If they see an error, they can click on 'I'd like to make some changes' to go back and edit responses. Note: they cannot change an already uploaded document once that is uploaded.
 - They should also be encouraged to 'Print my application' as once they submit the application, they will no longer be able to view the information.

A screenshot of the University of Minnesota Online Scholarship Application review page. The header features the University of Minnesota logo and the text "UNIVERSITY OF MINNESOTA Driven to Discover™". A search bar is on the right. The main heading is "University of Minnesota Online Scholarship Application". Below this, the user's name "Josh [redacted]" is displayed. The main content area says "Please review your responses." and "You answered the following:". There are two sections: "Briefly describe your career goals and plans after completing your undergraduate degree." with the response "I wish to pursue a career in elementary education." and "Please upload your resume here." with the response "Student Resume Document.docx". Below these are two buttons: "I'd like to make some changes" and "Print my application", both with red arrows pointing to them. At the bottom, there is a checkbox labeled "I have read and understand the conditions stated above" and a "Submit my application" button.

6. Once they check the box next to 'I have read and understand the conditions stated above' they will be able to click on 'Submit my application.'

To the best of my knowledge, the information included on this document is true. I understand that misrepresentation of facts in connection with this document whenever discovered may be sufficient cause, in and of itself, for cancellation or repayment of my scholarship. I understand that if any changes in my enrollment status or other financial aid occur, my eligibility may change.

If I receive a University scholarship I give permission to the University of Minnesota to release information from my student record and my student ID photo to the University of Minnesota Foundation and scholarship donors, and to announce receipt of my scholarship(s) in newspapers, college brochures and newsletters, or other publications. If asked, I agree to write a thank you letter to the scholarship donor(s).

☒ I have read and understand the conditions stated above

[Submit my application](#)

7. The student will receive confirmation that the application has been submitted.

Your OSF Scholarship scholarship application has been submitted.

If you have any questions about your application please contact Office of Student Finance.

[Return to scholarships](#)

8. If they click on 'Return to scholarship' they will go back to the list of applications and will see that the application they just submitted has an updated status of applied.

Josh [REDACTED] [REDACTED]

Instructions and Tips

| Title | College | Status | Aid Year | Close date |
|---|----------------------------|-------------|----------|------------|
| CLA Scholarship Application | College of Liberal Arts-TC | ✓ Apply now | 2022 | 08/12/2021 |
| U of M Women's Club Scholarship 2021-2022 | Office of Student Finance | ✓ Apply now | 2022 | 05/01/2021 |
| Office of Student Finance Scholarship | Office of Student Finance | ✗ Applied | 2022 | 02/26/2021 |

For Questions: Contact the Office of Student Finance Scholarship Unit

Main Scholarship Unit Email

saosf@umn.edu

LuGail Hamel

lhamel@umn.edu

612-624-6043

Nate Rosckes

rosck001@umn.edu

612-624-2324

Michelle Curtis

mcurtis@umn.edu

612-626-6518