Scholarship Administrators Meeting
April 3, 2019, 2019

Introductions

PeopleTools 8.56 Update – Christina Yoong & March Keaveny

PeopleSoft will be upgraded during the weekend of June 1 & 2, being live on Monday, June 3. The main difference is the landing page when you log on. There will be eight “TILES”, grouping tasks under functional categories. A demo was given; however, there will be forthcoming communications beginning in early May. Tutorial help and videos will be included with the communications.

A copy of the presentation, formatted in its original form, is attached.

Office of Student Finance – Michelle Curtis and Nate Rosckes

- **AY 2018/2019**
  - To date, there have been 23,000 scholarships/$1.4 million added to students for the current year.
  - Scholarships for the current year can be added until May 13th, with the term ending on May 15th.

- **Summer 2019**
  - Scholarships for Summer 2019 can now be uploaded.
  - The student does need to be registered in a class before the scholarship will successfully load to the account.
    - LuGail is tracking the scholarship for students not registered; adding as the students complete registration.
  - If a student is going to be doing research for the summer, and not taking a class with credits attached to it, the student must register in a 4999 course, using a specific designated course nbr. This differs between undergrad and graduate status. Instructions are located on the ASR page. Disbursements cannot be made to a student unless they are registered for credits.
  - Summer disbursement is scheduled for June 3, 2019.

- **AY 2019/2020**
  - Already 11,000 scholarships/$72 million dollars have been added to student accounts for next year.
  - Most of these are for incoming freshmen; so unknown how many will actually be disbursed to students.
  - Actual packaging will be completed by Mid-July for students. Scholarships should be uploaded by end of June, if possible, for it to be included in the initial packaging.
  - Scholarships can be added after that date, but may require repackaging of student award.

- STAR was temporarily offline this past week, but is now available.

Next meeting will be held on June 5, 2019
PeopleTools 8.56 Update

ASR IT: Marc Keaveny
ASR Communications: Christina Yoong
Covering today

- Project overview
- New homepage(s)
- New navigation options
- Central training plan
- Central communications plan
Project overview

• PeopleTools is a development platform within PeopleSoft.

• Project team includes the following:
  – Campus Solutions (CS, that’s us!)
  – Finance (EFS)
  – Human Resources (HR)
  – Office of Information Technology (OIT)
  – MyU Portal Team
Project overview

- Update scheduled for June 1-2, 2019.
- PT 8.55 will no longer be supported.
- Introduction of new homepages and navigation.
Welcome to My Homepage

To personalize this homepage, go to your Actions List (three vertical dots) in the top-right corner.

For detailed instructions on how to add and remove tiles to this homepage, please refer to the Personalize My Homepage guide.
Central training plan

- Overview demo video (1)
- Google Slide job aids (6)
  - Homepage Navigation Overview
  - Personalize My Homepage
  - Change Default Homepage
  - My Favorites
  - NavBar
  - Navigation (Nav) Collections
Job aids will be linked on MyU > Key Links > PeopleSoft

PeopleSoft Systems
- Campus Solutions
- EFS/Finance
- EFS/Finance - Reporting Only
- Human Resources

EFS News

Finance system messages
For assistance contact controller@umn.edu or call 612-624-1617.

<table>
<thead>
<tr>
<th>Audience</th>
<th>Date</th>
<th>Message</th>
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<tbody>
<tr>
<td>Payroll</td>
<td>2/11/19</td>
<td><strong>Year-End Payroll Adjustments Being Run Today</strong></td>
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<tr>
<td>Accounting</td>
<td></td>
<td>As part of the normal year-end process, Payroll Services runs an</td>
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<td>abbreviated year-end, off-cycle payroll to make year-end adjustments</td>
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<td>and check adjustments or reversals that affect employees’ 2018</td>
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<td>year-to-date amounts. This payroll was processed on Monday, February</td>
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<td>11th. As a result, you may see an additional UM Payroll Verification</td>
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<td></td>
<td>Reports for your department in the Reporting Center with a pay end</td>
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<td>date of 12/08/18. These payroll entries will post to the General</td>
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<td>Ledger on Wednesday evening with an accounting date of 02/13/19.</td>
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<td>Note: If there were no employees that had year-end adjustments, there</td>
</tr>
<tr>
<td></td>
<td></td>
<td>will be no payroll verification report available for your area.</td>
</tr>
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| General        | 2/11/19 | **Period 7 is closed**                                                 |
| Ledger         |         |                                                                        |
Central communications plan

- OIT will send to all PS users on all campuses.
- Generic U of M email template.
- Messages will start one month prior to go-live date and then weekly until it’s in production.
  - Message 1 contains a short demo video.
  - Subsequent messages include high-level topics and job aids, like how to add favorites.
  - 5 total messages planned
Additional communication efforts

- **Meetings**
  - System Registrars Council (SRC)
  - System Student Finance Council (SSFC)
  - Student Financial Aid Council (SFAC)
  - Admissions TC and all-campus
  - One Stop TC and all-campus
  - Registrar's Advisory Committee (RAC)
  - Graduate Program Coordinators Network (GPCN)
  - College Advisory Group (CAG)
  - TC Scholarship Administrators

- **Newsletters**
  - Training Update (TC)
  - Scheduling Update (TC)
  - The Record (TC)
Thank You