



ScholarTrack Refresher Workshop

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November 8th, 2019



Agenda

- ScholarTrack Processes
 - Accessing ScholarTrack
 - Viewing and Understanding Award Offers
 - New Edits
 - ISIR Requests and Overrides
 - Credit Completion and Credit Bank
 - Claims and Refunds
 - Payments and Refund Requests
 - Manage Awards
 - Reports
- Questions from the group



Accessing ScholarTrack

Accessing ScholarTrack

- User Account Creation
 - College Admin Users will create user accounts in ScholarTrack for new ScholarTrack users under the Manager Users section.

INDIANA COMMISSION for HIGHER EDUCATION

Manage Users

STUDENTS

AWARDS

CLAIMS

CREDIT COMPLETION

PAYMENTS

REPORTS

ACCOUNT

Manage Users

+ Add New User

Search Clear Status

Filtering By:

Active X



Accessing ScholarTrack

Add User



First Name

Last Name

Email Address

Phone Number

Extension

Role

Active

Read Only

Photo

Change Photo

.jpeg, .jpg, .gif, .tiff, .tif, .bmp, .png files accepted

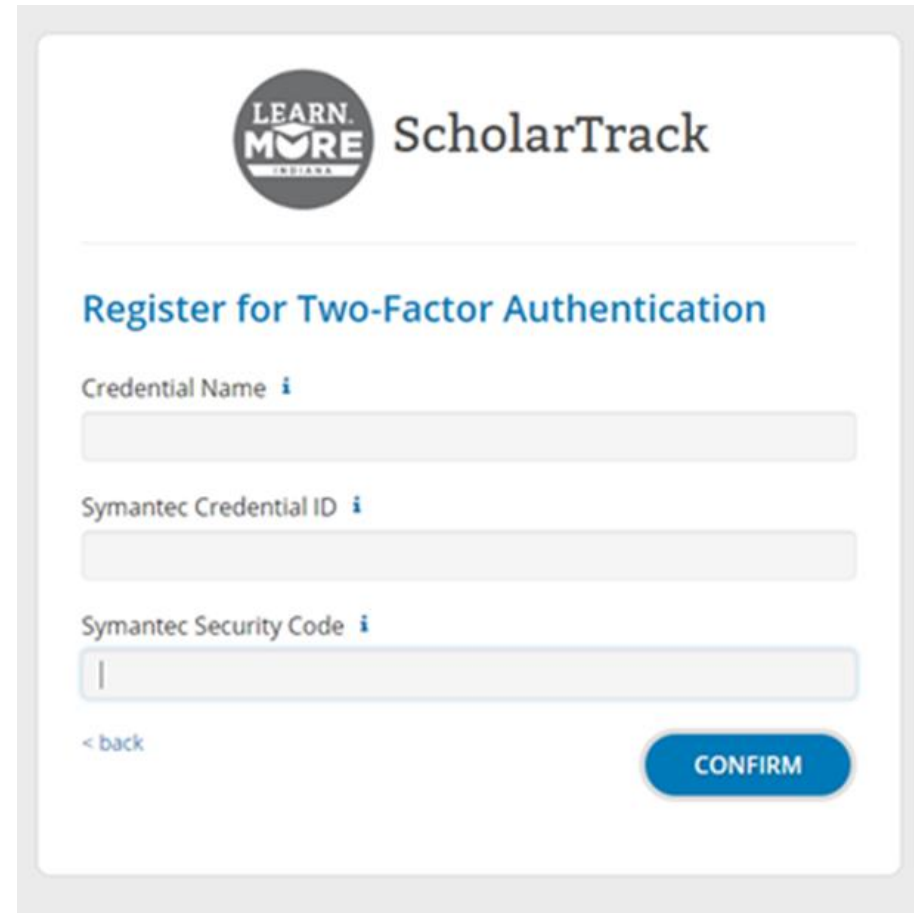


Cancel

Save

Accessing ScholarTrack

- Two-Factor Authentication
 - The Indiana Commission for Higher Education is now requiring Two-Factor Authentication for college users to log into ScholarTrack.
 - After the initial ScholarTrack Login page, users will be asked on the next page to provide a Credential Name, Symantec Credential ID, and a Symantec Security Code.



The screenshot shows the ScholarTrack registration page for Two-Factor Authentication. At the top, there is a logo with the text "LEARN. MORE. INDIANA" and the word "ScholarTrack" next to it. Below the logo, the heading "Register for Two-Factor Authentication" is displayed in blue. The form contains three input fields: "Credential Name", "Symantec Credential ID", and "Symantec Security Code". Each field has a small information icon to its right. At the bottom left of the form, there is a "< back" link, and at the bottom right, there is a blue "CONFIRM" button.



Accessing ScholarTrack

- For users who already have a hard token that is used to log into FAA Access to CPS online, they may enter the serial number located on the back of the hard token in the Credential ID box. The Security Code will be generated by pressing the button on the front of the token.



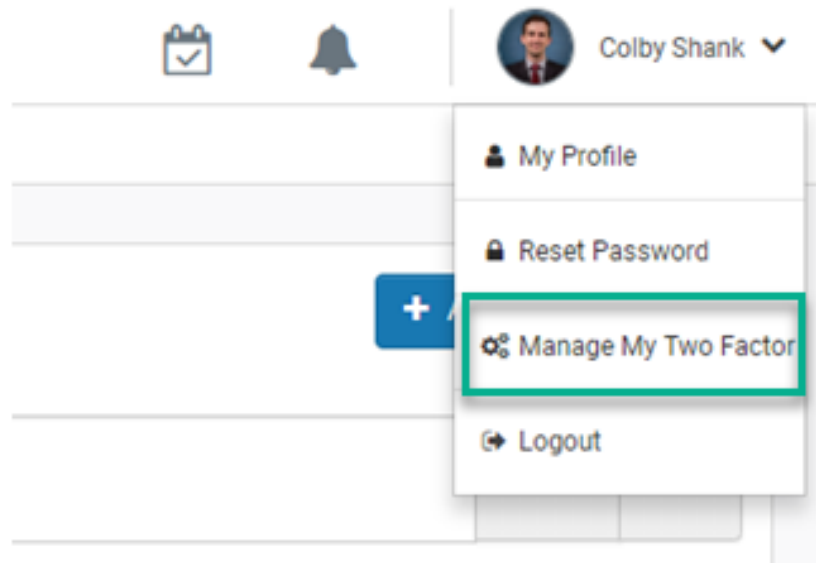
Accessing ScholarTrack

- If a user does not have a hard token, they may download the Symantec VIP Access App on their mobile device through the appropriate app store (App Store on Apple Devices or Google Play Store on Android Devices).
- Users may also download a desktop version of the app on their computer at Vip.Symantec.com. Click on 'Download' then select 'Mac' or 'Windows.'



Accessing ScholarTrack

- While logged into ScholarTrack, you can add additional credentials as well as delete existing credentials in the upper-right corner of the screen by clicking "Manage My Two Factor".



Accessing ScholarTrack

- If you no longer have access to your two-factor authentication token, please contact a College Admin user at your institution to clear your existing credentials.

Filtering By: Active X

User	Email Address	Role	User Access	Status	Last Login	Two-Factor Authentication	Actions
		College Admin		Active	11/7/19 11:26 AM	Required - Credential Registered	

Previous 1 Next



Accessing ScholarTrack

- Available User Types in ScholarTrack:
 - College Admin User
 - College Financial Aid User
 - College Support User
 - College Accounting User
- Accounts can be set as ‘Read-Only’ which allows the user to view but not take any actions in ScholarTrack.



Accessing ScholarTrack

College Admin User

- Students
 - Student Search
 - Information File
 - ISIR Requests
 - Overrides
- Awards
 - Manage Awards
- Claims
 - Claims and Refunds
- Credit Completion
 - Report Credit Completion
 - Report Credit Bank
- Payments
 - Invoices
- Reports
 - College
- Accounts
 - Manage Users



Accessing ScholarTrack

College Financial Aid User

- Students
 - Student Search
 - Information File
 - ISIR Requests
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- Awards
 - Manage Awards
- Claims
 - Claims and Refunds
- Credit Completion
 - Report Credit Completion
 - Report Credit Bank
- Payments
 - Invoices
- Reports
 - College



Accessing ScholarTrack

College Support User

- Students
 - Student Search
 - ISIR Requests
- Awards
 - Manage Awards



Accessing ScholarTrack

College Accounting User

- Students
 - Student Search
- Payments
 - Invoices



Accessing ScholarTrack

- Admin Users can disable a user at any time by searching for the user under 'Manage Users' and then selecting the 'Deactivate' button.

Search interface showing filtering options and a table of users. The 'Deactivate' button is highlighted in the actions column for a user.

Buttons: + Add New User, Export

Search: [Search] [Clear] [Status] [Role] [School]

Filtering By: Active X College X

User	Email Address	Role	User Access	Status	Last Login	Two-Factor Authentication	Actions
[User Icon]	[Redacted]	College Support User Read Only	[Redacted]	Active	6/28/19 2:07 PM	Required - Credential Registered	[Settings] [Edit] [Key] [Lock] [Pencil] Deactivate



Accessing ScholarTrack

- Institutions must have a process in place for identifying when existing ScholarTrack users exit employment with your institution or move into a role that no longer requires access to financial aid data.



Accessing ScholarTrack

- Admin Users must perform a yearly review of their institutions' ScholarTrack users. If any users are no longer employed at that institution or have moved into a role that does not require ScholarTrack access, those users' accounts must be deactivated.



Viewing and Understanding Award Offers

Viewing and Understanding Award Offers

- Student Search
 - Users may search for students with the following identifiers or combination of identifiers:
 - First Name & Last Name
 - First Name + Last Name + Date of Birth
 - Social Security Number
 - Last 4 SSN + First or Last Name or DOB
 - Scholar ID
 - Telephone Number
 - Email Address



Viewing and Understanding Award Offers

- Student Details Page - Header

Sally Scholar xxx-xx-1234



[+ Request Merge](#)

ISIR YEAR:

● 2019 - 2020 ▼

 Scholar ID: **123456**

 Date of Birth: 10/23/2000


 Social Security Number: xxx-xx-
1234 


 Full User Account:

sallys@gmail.com 

 Parent Profile: No

 Mailing Address:

101 W. Ohio St. 
Indianapolis, IN. 46204

 Phone Number: 888-528-4719

 Contact Email Address:

sallys@gmail.com 

 EFC: \$956

 Dependency Status: Dependent

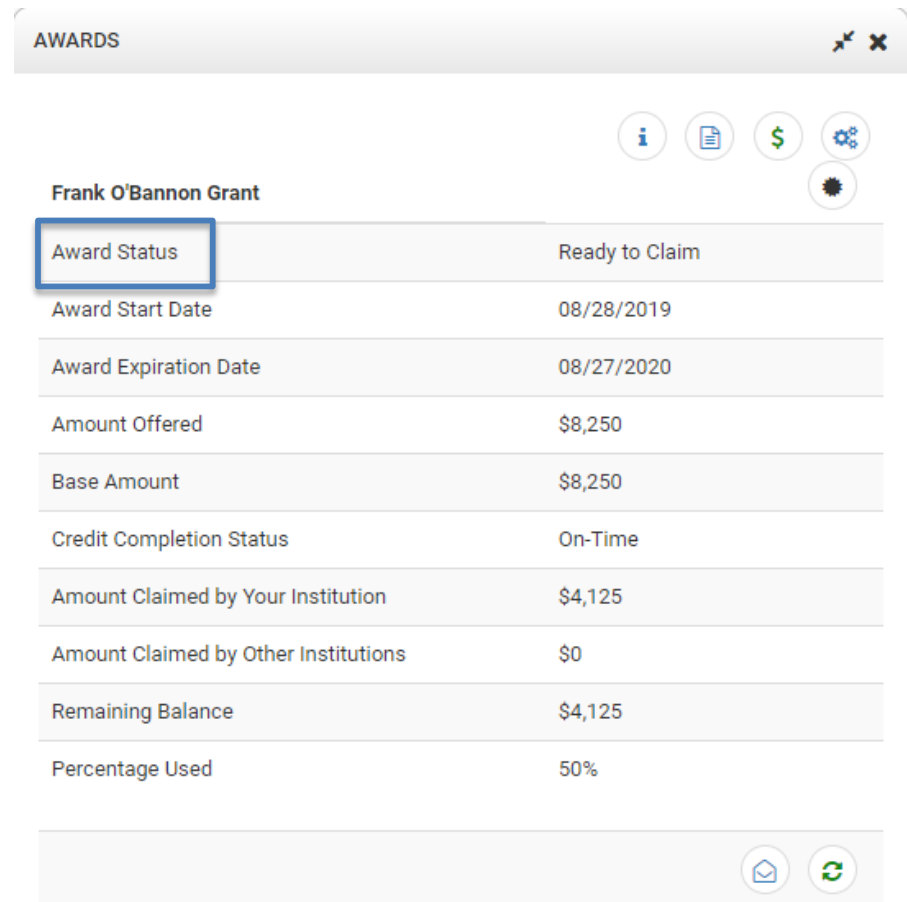
 State Aid Used: 50 / 400



INDIANA COMMISSION for
HIGHER EDUCATION

Viewing and Understanding Award Offers

- Awards Widget
 - Award Status
 - **“Ready to Claim”** – Award can be disbursed and claimed.
 - **“Award Offered”** – Award can be disbursed and will be available to claim on or shortly before award start date.
 - **“On Hold”** – Award cannot be disbursed or claimed until one or more issues is resolved.
 - **“Former Offer”** – Previously offered award, but new information has removed this award offer. If a remaining balance exists, insert a refund.
 - **“No Award Offered”** – Student not eligible for award. Never offered.
 - **“Expired”** – Previously offered award. Past the award expiration date. Claims against award placed on hold and subject to review by CHE staff.



The screenshot shows a web interface for viewing award details. At the top, there is a header 'AWARDS' with a close button. Below the header, there are several icons: an information icon, a document icon, a dollar sign icon, a gear icon, and a sun icon. The main content area is titled 'Frank O'Bannon Grant'. Below the title, there is a table with the following data:

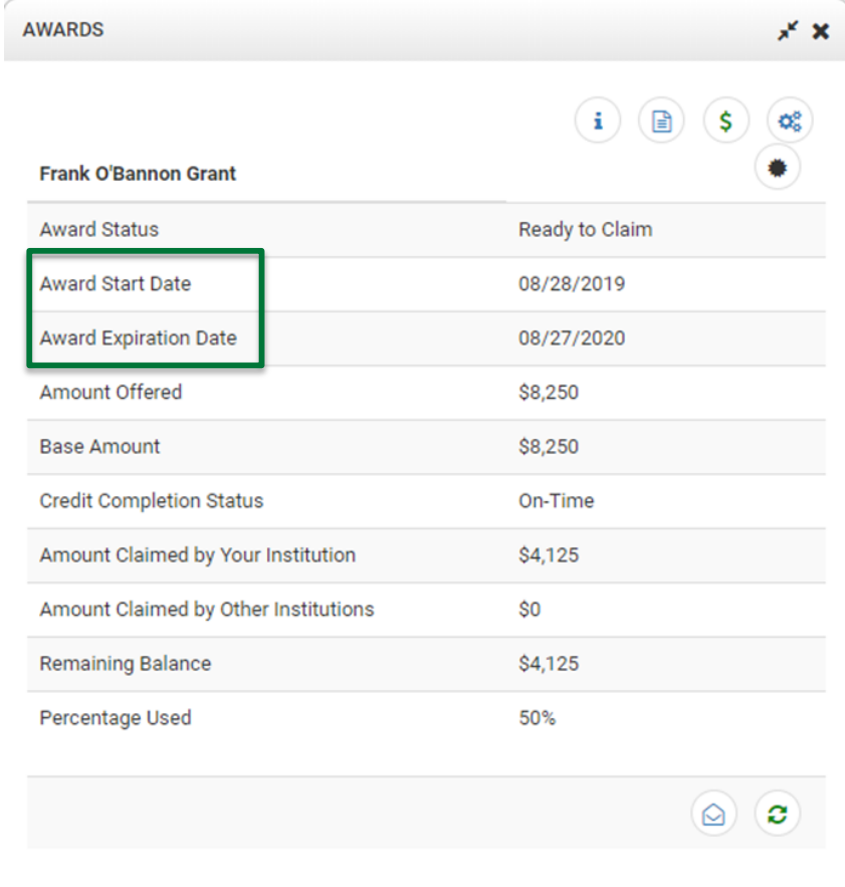
Award Status	Ready to Claim
Award Start Date	08/28/2019
Award Expiration Date	08/27/2020
Amount Offered	\$8,250
Base Amount	\$8,250
Credit Completion Status	On-Time
Amount Claimed by Your Institution	\$4,125
Amount Claimed by Other Institutions	\$0
Remaining Balance	\$4,125
Percentage Used	50%

At the bottom of the table, there are two icons: a home icon and a refresh icon.



Viewing and Understanding Award Offers

- Awards Widget
 - Award Start/Expiration Date
 - Determines in which terms at your institution an award offer can be applied and claimed.



The screenshot shows a web interface for viewing award offers. At the top, there is a header labeled "AWARDS" with a close button. Below the header, there are several icons: an information icon, a document icon, a dollar sign icon, a settings icon, and a refresh icon. The main content area displays the details for the "Frank O'Bannon Grant". The details are presented in a table format with two columns: the award attribute and its value. The "Award Start Date" and "Award Expiration Date" rows are highlighted with a green border. At the bottom right of the widget, there are two more icons: an envelope icon and a refresh icon.

Frank O'Bannon Grant	
Award Status	Ready to Claim
Award Start Date	08/28/2019
Award Expiration Date	08/27/2020
Amount Offered	\$8,250
Base Amount	\$8,250
Credit Completion Status	On-Time
Amount Claimed by Your Institution	\$4,125
Amount Claimed by Other Institutions	\$0
Remaining Balance	\$4,125
Percentage Used	50%



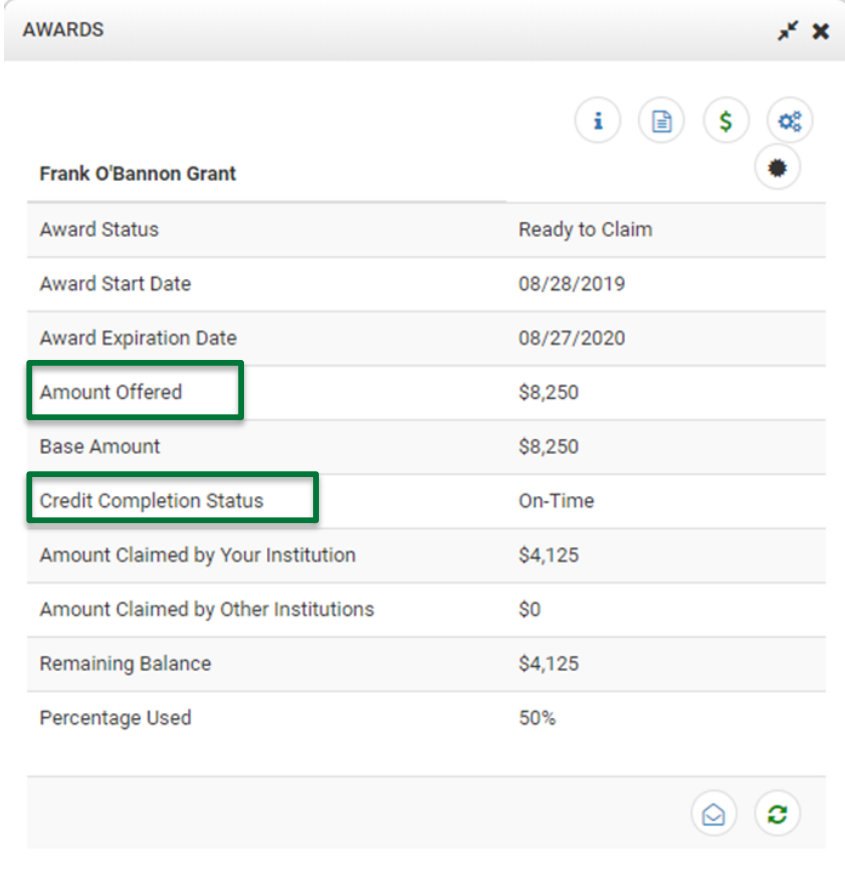
Viewing and Understanding Award Offers

- Award Start and Expiration Dates:
 - If the student has never previously used state aid, or used state aid more than one award year ago:
 - Initially set as 7/1 – 6/30
 - Will adjust to (term start date of first term claimed) – (1 year – 1 day) once claimed
 - If student used state aid last award year:
 - Initially set as (last award year's award expiration date + 1 day) – 6/30
 - Will adjust to (term start date of first term claimed) – (1 year – 1 day) once claimed
 - Exception: CVO and William A. Crawford Minority Teacher Scholarship always run 7/1 – 6/30
 - Exception: Mitch Daniels Early Graduation Scholarship always runs 7/1 – 12/31



Viewing and Understanding Award Offers

- Awards Widget
 - Amount offered
 - Total amount of annual award offered to student
 - For Frank O’Bannon recipients, this amount will be base award + incentives.
 - Credit Completion Status
 - Refers to whether the student is eligible for a full-time or on-time Frank O’Bannon Grant based on number of credits earned.



The screenshot shows a web interface for viewing award details. At the top, there is a header 'AWARDS' with a close button. Below the header are several icons: an information icon, a document icon, a dollar sign icon, a gear icon, and a refresh icon. The main content area displays the title 'Frank O'Bannon Grant' followed by a table of award details. The table has two columns: the award attribute and its value. Two rows, 'Amount Offered' and 'Credit Completion Status', are highlighted with green boxes. At the bottom right of the table area, there are icons for a home page and a refresh action.

Frank O'Bannon Grant	
Award Status	Ready to Claim
Award Start Date	08/28/2019
Award Expiration Date	08/27/2020
Amount Offered	\$8,250
Base Amount	\$8,250
Credit Completion Status	On-Time
Amount Claimed by Your Institution	\$4,125
Amount Claimed by Other Institutions	\$0
Remaining Balance	\$4,125
Percentage Used	50%



Viewing and Understanding Award Offers

- Awards Widget
 - Amount Claimed by Your Institution
 - Total amount of annual award claimed by your institution.

AWARDS	
Frank O'Bannon Grant	
Award Status	Ready to Claim
Award Start Date	08/28/2019
Award Expiration Date	08/27/2020
Amount Offered	\$8,250
Base Amount	\$8,250
Credit Completion Status	On-Time
Amount Claimed by Your Institution	\$4,125
Amount Claimed by Other Institutions	\$0
Remaining Balance	\$4,125
Percentage Used	50%



Viewing and Understanding Award Offers

- Awards Widget
 - Amount Claimed by Other Institutions
 - Total amount of annual award claimed by other institutions the student used state financial aid at in the given award year.

AWARDS ✕

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Frank O'Bannon Grant


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Credit Completion Status	On-Time
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Remaining Balance	\$4,125
Percentage Used	50%





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Viewing and Understanding Award Offers



- Awards Widget
 - Remaining Balance
 - Amount of award available after claims made.

AWARDS 

Frank O'Bannon Grant 

Award Status	Ready to Claim
Award Start Date	08/28/2019
Award Expiration Date	08/27/2020
Amount Offered	\$8,250
Base Amount	\$8,250
Credit Completion Status	On-Time
Amount Claimed by Your Institution	\$4,125
Amount Claimed by Other Institutions	\$0
Remaining Balance	\$4,125
Percentage Used	50%



Viewing and Understanding Award Offers

- Awards Widget
 - Percentage Used
 - How we determine the remaining balance of an award when a student uses aid at multiple institutions.

AWARDS	
Frank O'Bannon Grant	
Award Status	Ready to Claim
Award Start Date	08/28/2019
Award Expiration Date	08/27/2020
Amount Offered	\$8,250
Base Amount	\$8,250
Credit Completion Status	On-Time
Amount Claimed by Your Institution	\$4,125
Amount Claimed by Other Institutions	\$0
Remaining Balance	\$4,125
Percentage Used	50%



Viewing and Understanding Award Offers

- To apply an award offer, award offer must be “Ready to Claim” or “Award Offered”.
- Award offers must overlap with academic term:
 - Award offer must start before academic term ends
 - Academic term must start before award offer expires.
- Amount that can be applied is limited to 50% of the student’s annual award amount during first term of award year (for Frank O’Bannon Grant, 21st Century Scholarship, Adult Student Grant, Next Generation Hoosier Educators Scholarship, Minority Teacher Scholarship).



Viewing and Understanding Award Offers

- Determine if student meets the enrollment status requirement for award type at “state financial aid census date” for given academic term. If student does not meet requirement on that date, treat the last day of the academic term as a second census date.
 - Student must be full-time for FOB/21st/Next Gen/Minority Teacher/MDEGS/dependent WRG/full-time NGSG
 - Student must be half-time for ASG/independent WRG
 - No enrollment status requirement for CVO or part-time NGSG



Viewing and Understanding Award Offers

- Student must be degree-seeking (or certificate-seeking at Ivy Tech/VU) in Title IV-eligible program during academic term.
 - Required for all award types except:
 - CVO (if student is in high school)
 - WRG (must be approved certificate program)
- Student be meeting Satisfactory Academic Program.
 - Required for all except CVO
 - Required for CVO beginning 2020-2021 award year



Viewing and Understanding Award Offers

- Amount applied cannot exceed eligible charges for academic term:
 - Defined as tuition and regularly assessed fees for Frank O’Bannon Grant, 21st Century Scholarship, Adult Student Grant, CVO
 - Defined as cost of attendance for Next Generation Hoosier Educators Scholarship, William A. Crawford Minority Teacher Scholarship
 - Mitch Daniels Early Graduation Scholarship must be tuition and fee charges first, then remaining balance refunded to student even if total grant aid exceeds cost of attendance



Viewing and Understanding Award Offers

- Amount applied cannot exceed eligible charges for academic term:
 - Defined as tuition and regularly assessed fees for Frank O’Bannon Grant, 21st Century Scholarship, Adult Student Grant, CVO
 - Defined as cost of attendance for Next Generation Hoosier Educators Scholarship, William A. Crawford Minority Teacher Scholarship
 - Mitch Daniels Early Graduation Scholarship must be tuition and fee charges first, then remaining balance refunded to student even if total grant aid exceeds cost of attendance
 - Reference the Order of Aid Application in Financial Aid Manual when determining eligible charges



Viewing and Understanding Award Offers

- Order of Aid Application:
 1. Private/Institutional Grant Aid or Scholarships Specifically for Tuition and Fees
 2. Tuition Assistance (TA) from U.S. Army and Other Branches
 3. Frank O'Bannon Grant, 21st Century Scholarship, Adult Student Grant
 4. Post 9/11 GI Bill Benefits (Chapter 33)
 5. National Guard Supplemental Grant/Extension Scholarship
 6. Tuition and Fee Exemptions for Children of Disabled Veterans and Public Safety Officers (CVO)
 7. William A. Crawford Minority Teacher Scholarship
 8. Next Generation Hoosier Educators Scholarship
 9. Mitch Daniels Early Graduation Scholarship
 10. Other Grant Aid or Scholarships
 11. Workforce Ready Grant
 12. Student Loans



Viewing and Understanding Award Offers

- Final Term Exceptions
 - Student does not need to meet enrollment status requirement (full-time, half-time) when they are in the final term of their degree program in order to use state financial aid.
 - Institutions may apply up to 100% of award offer in final term (up to eligible charges)



Viewing and Understanding Award Offers

- Summer Term Exceptions:
 - Student does not need to meet enrollment status requirement based on student's prior aid usage and enrollment pattern (see chart).
 - Student is considered degree-seeking in summer if student is guest student at your institution if student used aid at another institution earlier in the award year.
 - Student may claim up to 100% of the student's annual award during the summer if the student has attended the institution full-time in all prior terms of the award year and did not use an award.



Viewing and Understanding Award Offers

- If summer is not the final term of a student's award year, the institution must notify the student that using state aid in the summer will reduce the amount of state aid available in the fall and receive consent from the student prior to applying state aid in the summer

Fall Term	Spring Term	Can attend part-time and use FOB, 21st, Next Gen, ASG, or WRG in the Summer?
Full-Time / Used State Aid	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	Yes
	Part-Time	Yes
	Did Not Attend	Yes
Full-Time / Did Not Use State Aid	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	Yes ¹
	Part-Time	No
	Did Not Attend	No
Part-Time	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	No
	Part-Time	No
	Did Not Attend	No
Did Not Attend	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	No
	Part-Time	No
	Did Not Attend	No



New Edits

Edit 07: Unusual Enrollment History

- Students flagged by the U.S. Department of Education as having an unusual enrollment history (UEH) are ineligible for state financial aid until the UEH flag is resolved.
- The edit places all award offers in an “On Hold” status.
- This edit will appear if Comment Code 360 is present.
- This edit can be overridden by an institution in ScholarTrack if the institution has resolved the UEH flag and has approved the student’s continuing eligibility for federal student aid.



Edit 09: Eight-Year Rule (Non-CVO)

- Students who first used state financial aid except for the Tuition and Fee Exemption (CVO) more than eight award years ago are no longer eligible to receive non-CVO state financial aid except for the Adult Student Grant and the Workforce Ready Grant.
- This edit prevents award creation of all award offers except CVO, the Adult Student Grant, and the Workforce Ready Grant.
- This edit will impact students who first used non-CVO state financial aid in the 2011-2012 award year or later. Students who first used non-CVO state financial aid before the 2011-2012 award year are not subject to the eight-year rule until they use non-CVO state financial aid again beginning with the 2017-2018 award year.



Edit 10: Eight-Year Rule (CVO)

- Students who first used the Tuition and Fee Exemption (CVO) more than eight award years ago are no longer eligible to receive CVO.
- This edit prevents award creation of CVO award offers.
- This edit will impact students who first used CVO in the 2011-2012 award year or later. Students who first used CVO before the 2011-2012 award year are not subject to the eight-year rule until they use CVO again beginning with the 2017-2018 award year.



Edit 15: Drug Conviction

- Students with certain drug convictions that make them ineligible to receive federal student aid are also ineligible to receive state financial aid.
- This edit prevents award creation of all award offers.
- This edit will appear if the student indicates on FAFSA Question #23 that the student has a drug conviction affecting eligibility for federal student aid for all or part of the award year. We create this edit if ISIR Field #26 (Drug Conviction Affecting Eligibility) = 2 (Yes, part-year) or 3 (Yes/I don't know), or if Reject 19 (An EFC cannot be calculated because the Department of Justice has placed a "hold" on the student) is present.
- This edit can be overridden by an institution in ScholarTrack if the student was only ineligible for federal student aid for part of the award year, and the student has now regained eligibility for federal student aid for the academic term.



Edit 16: Selective Service

- Males students who are ineligible for federal student aid for failing to register with the Selective Service System (SSS) are also ineligible for state financial aid.
- The edit prevents award creation of all award offers.
- This edit will appear if ISIR Field #375 (Selective Service Match Flag) = N and ISIR Field #376 (Selective Service Registration Flag) is a value other than Y.
- This edit can be overridden by an institution in ScholarTrack if the institution determines the student was either exempt from registration or failure to register was not knowing or willful.



ISIR Requests & Overrides

ISIR Requests & Overrides

- ISIR Transaction Widget

ISIR TRANSACTIONS ✕

#7 - Completed 05/23/2019 ▼ + Request ISIR

Transaction Data ▼ ➔

Primary EFC	Dependency Status	Source	Actions
\$1,216	Dependent	School	+ ✎



ISIR Requests & Overrides

- Users may enter requests for a missing ISIR or ISIRs directly through the ISIR Transactions Widget.

✕

Confirm ISIR Request

ISIR Year

Original Social Security Number

Original First Name

Original Last Name

Cancel Save



ISIR Requests & Overrides

- Users may also request ISIRs in batch via the ISIR Requests file. A blank template can be found under the ISIR Requests tab in ScholarTrack.

The screenshot displays the ScholarTrack user interface. On the left is a sidebar with a menu containing 'STUDENTS', 'Student Search', 'Information File', 'ISIR Requests' (highlighted), and 'Overrides'. The main area features two tabs, 'Requests' and 'Imports', with 'Requests' selected. Below the tabs is an 'Upload' button and a table. The table has columns for 'Date', 'User Name', 'Status', and 'Actions'. In the top right corner of the main area, a 'Blank Template' button is highlighted with a red box.



ISIR Requests & Overrides

- Users can request an ISIR via the Request ISIR button, which can be found under the ISIR Requests tab in ScholarTrack.

The screenshot displays the 'ISIR Requests' interface. At the top, there are two tabs: 'Requests' and 'Imports'. Below the tabs is a search bar and two filter dropdowns: 'ISIR Year' (set to '2020 - 2021') and 'Status'. A red box highlights a '+ Request ISIR' button in the top right corner. Below the filters is a table with the following columns: Student, SSN, Requested By, Requested On, Status, Submitted to CPS On, Received On, Transactions, and Actions. The table is currently empty, displaying 'No data available in table'. At the bottom left, it says 'Showing 0 to 0 of 0 entries', and at the bottom right, there are 'Previous' and 'Next' navigation buttons.



ISIR Requests & Overrides

- For award purposes, CHE will use the latest ISIR transaction with a Primary EFC unless:
 - An override has been placed on an ISIR transaction.
 - If multiple overrides are placed, we use transaction with lowest EFC.
 - Overrides can be placed by ScholarTrack users.
 - Overrides also placed when school ISIR transaction is received where one or more of the following is true:
 - EFC Increased
 - EFC Decreased
 - Professional Judgment
 - Dependency Override



ISIR Requests & Overrides

- If an institution has reason to believe the ISIR transaction used by ScholarTrack is not accurate, the institution must apply an ISIR override.
- This can be done via:
 - Overrides File
 - ISIR Transactions Widget



ISIR Requests & Overrides

- Select the transaction from the drop-down and click on the green plus sign to place an override.

ISIR TRANSACTIONS ✕

#7 - Completed 05/23/2019 ▼ + Request ISIR

Transaction Data ▼ ➔

Primary EFC	Dependency Status	Source	Actions
\$1,216	Dependent	School	+ ✎



ISIR Requests & Overrides

Are you sure that you want to use this ISIR for EFC and Dependency information during award calculation?

No

Yes



ISIR Requests & Overrides

ISIR Requests

Calendar icon | Notification bell icon (15) | Profile icon | Dropdown arrow

Requests | Imports

Upload

Blank Template

Date	User Name	Status	Actions

Showing 1 to 2 of 2 entries

Previous | 1 | Next



ISIR Requests & Overrides

- For award purposes, CHE will use the latest ISIR transaction with a Primary EFC unless:
 - An override has been placed on an ISIR transaction.
 - If multiple overrides are placed, we use transaction with lowest EFC.
 - Overrides can be placed by ScholarTrack users.
 - Overrides also placed when school ISIR transaction is received where one or more of the following is true:
 - EFC Increased
 - EFC Decreased
 - Professional Judgment
 - Dependency Override



Credit Completion and Credit Bank

Credit Completion and Credit Bank

- What Credit Completion Data should be reported in ScholarTrack?
 - Report for all students on the file – even if they no longer attend or have never attended the institution. Blank Record = Not Reported.
 - Local credit hours and cumulative GPA earned in a specific academic term.
 - Only report coursework earned with a grade of D- or better.
 - Public institutions should also “push” a file with all Indiana undergraduate students enrolled at their institution.
 - Continue to monitor and report as grades change for students (grade appeals, incompletes, etc.), report updated hours for past terms.



Credit Completion and Credit Bank

- When should Credit Completion Data be reported in ScholarTrack?
 - Institutions must report Credit Completion data within two weeks of posted grades;
 - Within two weeks for updated data (grade changes, etc.);
 - Within two weeks for new additions to file (requests, late claims, etc.)



Credit Completion and Credit Bank

- You can report Credit Completion Data in ScholarTrack in one of three ways:
 - 1. Individually through the “Student Details” page and “Credit Completion” widget.
 - 2. Individually through the “Report Credit Completion” page.
 - 3. By requesting and uploading a Credit Completion file through the “Report Credit Completion” page.



Credit Completion and Credit Bank

- If a student on your Credit Completion file did not attend your institution, report 0 hours for Local Credit Hours and 0.0000 for Cumulative GPA.
- You can add additional student records to your Credit Completion file. We will accept the data if the student record can be located in ScholarTrack.
- Once reported, Credit Completion data for a given term will remain in ScholarTrack.



Credit Completion and Credit Bank

- Unless a correction is needed, you will report Credit Completion data for a given term one time per student record.
- If you need to make a correction, submit a new Credit Completion transaction. Each Credit Completion transaction replaces the previously submitted Credit Completion transaction by your institution.
- If a Credit Completion transaction decreases any hours previously reported by your institution, the transaction will be placed on hold for review by CHE staff.




Credit Completion and Credit Bank


- How to report Credit Completion via the Credit Completion Widget:

CREDIT COMPLETION

No Hours Reported

Total Hours 0 

Requested Schools	Year	Request Date	Report Date
No requests have been made			



Add Local Credit Hours

School
Ivy Tech Community College

Year
2019 - 2020

Term
Fall 2019: 8/26/2019 - 12/21/2019

Local Hours Earned

Cumulative GPA

Bachelor's or Professional Degree Earned?
No Degree Earned


Satisfactory Academic Progress (SAP)
Unknown

Cancel Save



Credit Completion and Credit Bank

- How to request a Credit Completion File:



INDIANA COMMISSION FOR HIGHER EDUCATION

- STUDENTS
- AWARDS
- CLAIMS
- CREDIT COMPLETION
- Report Credit Completion**
- Report Credit Bank

IMPORT CREDIT COMPLETION DATA

Upload Download

Request Credit Completion File

- + 2016 - 2017
- + 2017 - 2018
- + 2018 - 2019
- + 2019 - 2020

Show Unreported Only

User Requested Only

File Version

Version 3

Request Now

Request Later

Schedule a Recurring Request

Credit Completion and Credit Bank

- How to report via the Credit Completion page:

✓ Report Credit Completion

CREDIT COMPLETION

REPORT INDIVIDUAL CREDIT COMPLETION

Add Local Credit Hours

First Name

Last Name

Social Security Number

Date of Birth

School

Local Hours Earned

Cumulative GPA

Cancel

Save



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Credit Completion and Credit Bank

- Who should report Credit Bank hours?
 - The institution where hours were earned (Dual Credit Hours) should report the hours.
 - If AP/IB credits are awarded by an institution, the institution awarding those credits should report the hours.
 - Conversely, if a student does not attend the institution awarding those credits, those credits should be removed if previously reported.




Credit Completion and Credit Bank

- How should Credit Bank Data be reported in ScholarTrack?
 - Via the Credit Bank file - Contains students who have used aid at your institution and/or user requests entered by students, College, or CHE Users. CHE also puts in requests based on matching CHEDDS data to ScholarTrack.
 - Via the Credit Bank Widget.



Credit Completion and Credit Bank

- How to request a Credit Bank File:



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STUDENTS

AWARDS

CLAIMS

CREDIT COMPLETION

✓ Report Credit Completion

IMPORT CREDIT BANK DATA

Upload

Download

Request Credit Bank File

Show Unreported Only

User Requested Only

File Version

Request Now

Request Later




Schedule a Recurring Request

Credit Completion and Credit Bank


- How to report Credit Bank data via the Credit Bank Widget:

CREDIT BANK ✕ ✕

Property	Value
+ AP/IB Hours	0
+ Dual Credit Hours	1
+ Credit Hours Earned in Excess of 30	0
+ Pre-Populated Hours	0
+ Credit Bank Adjustment	0
- Reserved for Award Creation	0
- Used for Awards	0
Balance	1

Requested Schools	Request Date	Report Date
No requests have been made		





Claims & Refunds

Claims & Refunds

- When can I claim for a term?
 - **Reconciliation Start Date:** This is the first day you may begin to claim for this term.
 - **Reconciliation Deadline:** This is the last day you may make claims for this term without restrictions. Claims made past this date will be placed on hold subject to review by the Commission.
 - **Reconciliation Deadline + 365 Days:** This is the last day CHE will consider claims made past the term's Reconciliation Deadline.



Claims & Refunds

- **When can I claim an award offer?**
 - You may claim an award offer when the award status is “Ready to Claim”.
 - You may claim an award offer if the Term Start Date or Term End Date overlaps with the Award Start Date or Award End Date.
 - You may claim an award offer that is “Expired” up to 365 days past the Award End Date. Claims made against “Expired” award offers will be placed on hold subject to review by the Commission.
 - Claims placed on hold are reviewed daily and released provided there are no concerns.








Claims & Refunds

- **How to claim or refund an award offer**
 - Via the Awards Widget on the Student Details page;
 - Via the Claim File, which you can request directly through ScholarTrack.





Claims and Refunds

AWARDS ✕

Frank O'Bannon Grant     

Award Status	Ready to Claim
Award Start Date	08/28/2019
Award Expiration Date	08/27/2020
Amount Offered	\$8,250
Base Amount	\$8,250
Credit Completion Status	On-Time
Amount Claimed by Your Institution	\$4,125
Amount Claimed by Other Institutions	\$0
Remaining Balance	\$4,125
Percentage Used	50%



Claims & Refunds

- STUDENTS
- AWARDS
- CLAIMS
- Claims/Refunds**
- CREDIT COMPLETION
- PAYMENTS
- REPORTS

CLAIMS & REFUNDS

START A REFUND OR INDIVIDUAL CLAIM

IMPORT A CLAIM

Upload

Download

Request File



Consortium Agreements

Consortium Agreements

- Student must be meeting Satisfactory Academic Progress at your institution to claim an award offer.
- With a consortium agreement in place, student must be meeting an award offer's enrollment status requirement based on enrollment between all institutions participating in the consortium agreement.
- With a consortium agreement in place, student must be enrolled in an eligible degree or certificate program at one or more of the institutions participating in the consortium agreement.
- In terms where a consortium agreement is in effect, institutions collectively may claim beyond 50% of the students award offer in the first term of the student's award year.



Consortium Agreements

- Student must list all institutions participating in consortium agreement on the FAFSA.
- For 21st, FOB, and NGSF: the award offer must first be applied to eligible tuition and regularly assessed fee charges at the institution participating in the consortium agreement with greatest tuition and regularly assessed fees. The remaining amount of the award offer then must be applied to eligible tuition and regularly assessed fee charges at the institution participating in the consortium agreement with the next greatest tuition and regularly assessed fees.
- Any changes in enrollment status or academic program at any institution participating in the consortium agreement must be communicated to the other institutions, as the change may impact award eligibility at one or all participating institutions.
- The host institution is responsible for coordinating the consortium agreement between institutions.



Payments and Refund Requests

Payments and Refund Requests

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\$ Invoices

STUDENTS ▾

AWARDS ▾

CLAIMS ▾

CREDIT COMPLETION ▾

PAYMENTS ▲

\$ Invoices

REPORTS ▾

Invoice History

Search Invoice and Voucher Number

Type ▾ Status ▾ School ▾ Award Type ▾ Award Year ▾ Invoice Date ▾ Paid Date ▾

Paid X Processed X

Search Clear




Payments and Refund Requests

- If your net claim balance is positive (we owe you \$\$), we process payments each week and make your payments a priority.
- If your net claim balance is negative (you owe us \$\$), we will wait for additional claims instead of processing refund requests.
- We will generate refund requests at the end of each quarter if your balance remains negative.



Manage Awards

Manage Awards

 INDIANA COMMISSION for HIGHER EDUCATION

Manage Awards

STUDENTS | AWARDS | **Manage Awards** | CLAIMS | CREDIT COMPLETION | PAYMENTS | REPORTS | ACCOUNT

Award: Earline S. Rogers Student Teaching Stipend for Minorities - Spring | **Award Year**: 2019 - 2020

Earline S. Rogers Student Teaching Stipend for Minorities - Spring Applications [Cancel] [Submit]

Search: [] [All] [Export]

Last Name	First Name	DOB	SSN	Scholar ID	Actions
[]	[]	[]	XXX-XX- []	[]	[] [] [] [] []
[]	[]	[]	XXX-XX- []	[]	[] [] [] [] []

Approve

[] []

Deny

[] []

Not Here

[] []



ScholarTrack Refresher Workshop