ScholarTrack Workshop

Colby Shank
Director of Financial Aid and
Student Support Services

June 12, 2017

Agenda

- **Presentation**
  - **Updates**
  - **Deadlines and Timeline**
  - **Understanding Credit Completion and the Credit Bank**
  - **Reconciliation**
  - **Using Files in ScholarTrack**
  - **Student Portal**
- **Q&A**
- **Feedback**

Updates

Tuition and Fee Exemption (CVO)

- **Application for Child of Disabled Veteran or Purple Heart Recipient is now available in ScholarTrack.**

- **Most applications submitted in ScholarTrack routed to IDVA for review and decision.**

- **ScholarTrack creates CVO award offers for approved applicants if current year ISIR on file.**

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Tuition and Fee Exemption (CVO)

- **Student applies for CVO benefit one time. ScholarTrack remembers eligibility for academic career.**

- **No signed application or approval letter needed if CVO application is visible in ScholarTrack.**

- **If student provides signed application or approval letter AND CVO application is NOT visible in ScholarTrack, send the student and CVO type to CollegeFA@che.in.gov.**

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National Guard Supplemental Grant

- **National Guard Supplemental Grant (NGSG) scheduled to launch this week.**

- **Students complete application once per academic year.**

- **Indiana National Guard reviews applicants and certifies students each academic term in ScholarTrack.**

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National Guard Supplemental Grant

- **ScholarTrack creates NGSG award offers for fall and spring semesters with separate award start and end dates when the Indiana National Guard certifies.**

- **NGSG award offers work better with Frank O'Bannon Grant and 21st Century Scholarship award offers.**

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Adult Student Grant

- **Application for 2017-2018 is now live in ScholarTrack.**

- **Students must be independent with an EFC of $1,500 or less.**

- **Students must enroll at least half-time.**

- **Students awarded in order the applications are received until budget is exhausted.**

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Mitch Daniels Early Graduation Scholarship

- **Application for 2017-2018 is available in ScholarTrack.**

- **Application deadline is September 1st.**

- **Award offers will be created on a rolling basis as graduation data is submitted to IDOE.**

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William A. Crawford Minority Teacher Scholarship

- **Application for 2017-2018 is available in ScholarTrack.**

- **Application deadline is September 1st.**

- **Colleges will determine applicant eligibility by September 8th.**

- **CHE will then set award amounts based on need and number of eligible applicants.**

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New Award Types

- **Next Generation Hoosier Educators Scholarship**

- **Workforce Ready Grant**

- **Adding fields to Claim and Information file layouts to support new award types.**

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Changes to Deadlines

- **FAFSA Filing Deadline for 2017-2018 and forward moved from March 10 to April 15.**

- **FAFSA Correction Deadline eliminated. Award offers created as correctable edits are resolved.**

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Signature Reject EFC

- For 2017-2018 award offers, CHE will use Signature Reject EFC if no Primary EFC available.

- CHE will create award offers for students if Signature Reject EFC available and only edits are student and/or parent signature rejects.

- Award offers will be "On Hold" until signature issues are resolved.

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New Reports in ScholarTrack

Two new reports available for College Financial Aid Users:

- **Award Reconciliation Report** – net amount claimed by student by award offer in an academic term

- **Claims/Refunds Report** – all claims and refunds made for a student by award offer in an academic term

You can find these new reports in ScholarTrack under Reports > College.

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Enrollment Status

- **To claim most state financial aid award offers, student must be full-time and degree-seeking by the end of the "CHE Refund Period."**

- **End of CHE Refund Period now referred to as "state financial aid census date."**

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Enrollment Status (cont.)

- **State financial aid census date is the last day a student can drop classes and receive a partial refund of tuition and fee charges, but no later than four weeks after the start of the academic term.**

- **Beginning with the 2017-2018 academic year, a student is considered full-time if the student is full-time on the state financial aid census date OR the last day of the academic term.**

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Enrollment Status (cont.)

Example 1:

Student is enrolled in 12 credit hours on the state financial aid census date.

Student ends academic term enrolled in 12 credit hours.

Student has an eligible enrollment status for the Frank O'Bannon Grant.

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Enrollment Status (cont.)

Example 2:

Student is enrolled in 12 credit hours on the state financial aid census date.

Student ends academic term enrolled in 9 credit hours.

Student has an eligible enrollment status for the Frank O'Bannon Grant.

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Enrollment Status (cont.)

Example 3:

Student is enrolled in 9 credit hours on the state financial aid census date.

Student ends academic term enrolled in 12 credit hours.

Student has an eligible enrollment status for the Frank O'Bannon Grant.

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Enrollment Status (cont.)

Example 4:

Student is enrolled in 9 credit hours on the state financial aid census date.

Student ends academic term enrolled in 9 credit hours.

Student does NOT have an eligible enrollment status for the Frank O'Bannon Grant.

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Deadlines and Timeline

Credit Completion Data Due

Initial submission deadline for Credit Completion data was last Friday, June 9th. Data is now due for completed academic terms.

Please request new Credit Completion files in ScholarTrack and review and report on any unreported records for completed terms. Blank = unreported.

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Credit Bank Data Due

Initial submission deadline for Credit Bank data was last Friday, June 9th. Data is now due.

Please request new Credit Bank files in ScholarTrack and review and report on any unreported records. Blank = unreported.

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High School Graduation Data

Deadline for high schools to report final graduation data was also last Friday, June 9th.

CHE is conducting outreach with high schools to report missing data before award creation.

Contact us if you identify any discrepancies. (ScholarTrack data vs. high school transcripts received by your institution.)

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21st Century Scholarship Amount

Public institutions almost finished setting tuition and fee amounts for 2017-2018.

CHE will calculate and communicate amount of 21st Century Scholarship at private and proprietary institutions when this amount is known.

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Award Creation

CHE will begin to create 2017-2018 award offers for Frank O'Bannon Grant, 21st Century Scholarship, National Guard Supplemental Grant, and Adult Student Grant the week of July 3rd.

Colleges: please schedule time to closely review award offers the week of July 10th.

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Award Notifications

Award notifications will be sent to students beginning the week of July 17th.

Over 100,000 students will be notified over two week period.

Award letter with plain text explanation of award offer will be available in ScholarTrack.

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Understanding Credit Completion and the Credit Bank

Credit Completion Requirement

All students who used the Frank O'Bannon Grant, 21st Century Scholarship, or Adult Student Grant in the 2016-2017 award year are subject to the new 30 per year credit completion requirement. This includes previously grandfathered students.

To renew in 2017-2018, students must earn 18 credit hours to renew the Adult Student Grant, 24 credit hours to renew the full-time Frank O'Bannon Grant, and 30 credit hours to renew the on-time Frank O'Bannon Grant or 21st Century Scholarship.

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Credit Completion Requirement (cont.)

Students who first used state financial aid before the 2013-14 award year (grandfathered students) and did not use the Frank O'Bannon Grant, 21st Century Scholarship, or Adult Student Grant in the 2016-17 award year are eligible to renew in the 2017-18 award year.

Grandfathered students that used the Frank O'Bannon Grant, 21st Century Scholarship, or Adult Student Grant in the 2016-17 award year are no longer grandfathered.

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Credit Completion Requirement (cont.)

Students subject to the original 30/60/90 credit completion requirement are eligible to renew the Frank O'Bannon Grant or 21st Century Scholarship in the 2017-18 award year if the credit completion requirement was met in the last award year the student used the Frank O'Bannon Grant or 21st Century Scholarship, or in a following award year.

This includes students who first and last used a Frank O'Bannon Grant or 21st Century Scholarship in the 2013-14, 2014-15, and 2015-16 award years and did not use an Adult Student Grant in 2016-17.

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Credit Completion Requirement (cont.)

Students who first and last used the Part-Time Grant or Adult Student Grant in the 2013-14, 2014-15, and 2015-16 award years and did not use the Frank O'Bannon Grant or 21st Century Scholarship in 2016-17 are eligible to renew the Adult Student Grant in 2017-18 if they earned at least 18 credit hours in the last award year the student used the Adult Student Grant, or in a following award year.

Legacy Hours vs. Credit Completion Data

Legacy Hours = Cumulative Credit Completion Data
- **Used to create 2014-15, 2015-16, and 2016-17 award offers**

Credit Completion = Term-Based Credit Completion Data
- **Used to create 2017-18 award offers and beyond**

Legacy Hours still important. Used to "pre-populate" Credit Bank for students who first used FOB or 21st between 2013-14 and 2015-16 award years.

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Credit Bank

Credit Bank will contain hours from four sources:

- **AP/IB Hours (from Credit Bank data)***
- **Dual Credit (from Credit Bank data)***
- **Credit Hours Earned Over 30 (from Credit Completion data)**
- **Pre-Populated Hours (from Legacy Hours data)****

* For students who did <u>not</u> first use FOB or 21st 2013-14, 2014-15, or 2015-16 award years.

** For students who first used FOB or 21st 2013-14, 2014-15, or 2015-16 award years.

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Requesting Credit Completion/Credit Bank Data

Missing Credit Completion or Credit Bank data can be requested in ScholarTrack by...

- **Students**
- **Parents**
- **College Support Users**
- **College Financial Aid Users**
- **College Admins**
- **CHE Staff**

Reconciliation

When can I disburse an award offer?

- **Student not selected for verification or verification is completed if eligibility for award offer is determined by EFC or dependency status.**

  <u>Required</u>: Frank O'Bannon Grant, 21st Century Scholarship, Adult Student Grant, William A. Crawford Minority Teacher Scholarship, Workforce Ready Grant

  <u>Not Required</u>: Tuition and Fees Exemption (CVO), National Guard Supplemental Grant, Mitch Daniels Early Graduation Scholarship, Next Generation Hoosier Educators Scholarship

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When can I disburse an award offer?

- **Student has an eligible enrollment status for award type.**

    <u>Full-time</u>: Frank O'Bannon Grant, 21st Century Scholarship, William A. Crawford Minority Teacher Scholarship, Mitch Daniels Early Graduation Scholarship, Next Generation Hoosier Educators Scholarship

    <u>Half-time</u>: Adult Student Grant

- **Student is meeting Satisfactory Academic Progress as required by award type.**

- **Student is degree-seeking as required by award type.**

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When can I disburse an award offer?

- **Student has eligible charges for the academic term.**

  <u>Tuition and Regularly Assessed Fees</u>: **Frank O'Bannon Grant, 21st Century Scholarship, National Guard Supplemental Grant, Adult Student Grant, Tuition and Fees Exemption (CVO), Workforce Ready Grant**

  <u>Cost of Attendance</u>: **William A. Crawford Minority Teacher Scholarship, Next Generation Hoosier Educators Scholarship**

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When can I disburse an award offer?

- **Award status is either "Award Offered" or "Ready to Claim".**

- **Award offer starts before academic term ends.**

- **Award offer expires after academic term starts.**

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When can I claim an award offer?

- **Award offer is disbursed or is scheduled to be disbursed to student.**

- **Student not selected for verification or verification is completed if eligibility for award offer is determined by EFC or dependency status.**

- **Student has an eligible enrollment status for award type.**

- **Student is meeting Satisfactory Academic Progress as required by award type.**

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When can I claim an award offer?

- **Student is degree-seeking as required by award type.**

- **Student has eligible charges for the academic term.**

- **Award offer is "Ready to Claim".**

- **Reconciliation window for academic term is open.**

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How much can I claim and disburse?

- **Cannot exceed eligible charges for academic term.**

- **First term claimed cannot exceed 50% of remaining balance.**

  Rule applies to: Frank O'Bannon Grant, 21st Century Scholarship, Adult Student Grant, William A. Crawford Minority Teacher Scholarship, Next Generation Hoosier Educators Scholarship

  Exception: Final term of academic degree program

  Exception: Summer guidance for Frank O'Bannon Grant and 21st Century Scholarship

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How much can I claim and disburse?

- Up to remaining balance in subsequent terms.

- Must claim and disburse full $4,000 for Mitch Daniels Early Graduation Scholarship.

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Reconciliation Windows

- **Reconciliation start date is the first day award offers can be claimed for an academic term.**

- **Reconciliation deadline is the last day award offers can be claimed for an academic term.**

- **Contact CHE if you need to make a claim after the reconciliation deadline. Should be the exception, not the rule.**

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Reconciliation Windows

- **Reconciliation start date will typically be three weeks before start date of academic term.**

- **Reconciliation deadline will typically be the last day of the month following the end of the academic term.**

- **<u>Example</u>:**

  Reconciliation Start Date: 7/31/2017
  Term Start Date: 8/21/2017
  Term End Date: 12/17/2017
  Reconciliation Deadline: 1/31/2018

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Using Files in ScholarTrack

Requesting a Claim File

Colby

https://scholartrack-iqa.che.in.gov/Admin#/reconciliation

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$ Claims/Refunds

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STUDENTS

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CLAIMS & REFUNDS

START A REFUND OR INDIVIDUAL CLAIM

IMPORT A CLAIM

Upload

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RECONCILIATION HISTORY

All History | Import History | Request History

📅 Date	👤 User Name	ℹ Status	✏ Actions
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RECONCILIATION TOTALS

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All History

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RECONCILIATIO

Request a Claim File   ✕

ISIR Years

Select years

Award Status

Award Offered ✕   On Hold ✕   Ready to Claim ✕   Select status

Award Types

Select types

Expires Before

__/__/___

Last Updated Since

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Include Delisted Awards with Claims

No

Cancel   Request

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[START A REFUND OR INDIVIDUAL CLAIM]

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RECONCILIATION HISTORY

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1/25/17 10:20 AM	Colby Shank (BSU)	Complete	⬇

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RECONCILIATION TOTALS

Preparing the Claim File

Save file as CSV and include the following fields:
- First Name, Last Name, SSN, DOB
- ISIR Year (same as Award Year)
- Institution Code
- Academic Year ("2016" for 2016-2017 academic year)
- Calendar (typically "Standard" for most institutions)
- Term ("Spring 2017" or "Term 2")
- Claim Amount ("FOB - Claim Amount" for Frank O'Bannon Grant)
- Certain award types require additional fields (like CVO or NGSG)

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| Upload | claim file | ⬆ Import |

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Claim File has been Processed

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RECONCILIATION TOTALS

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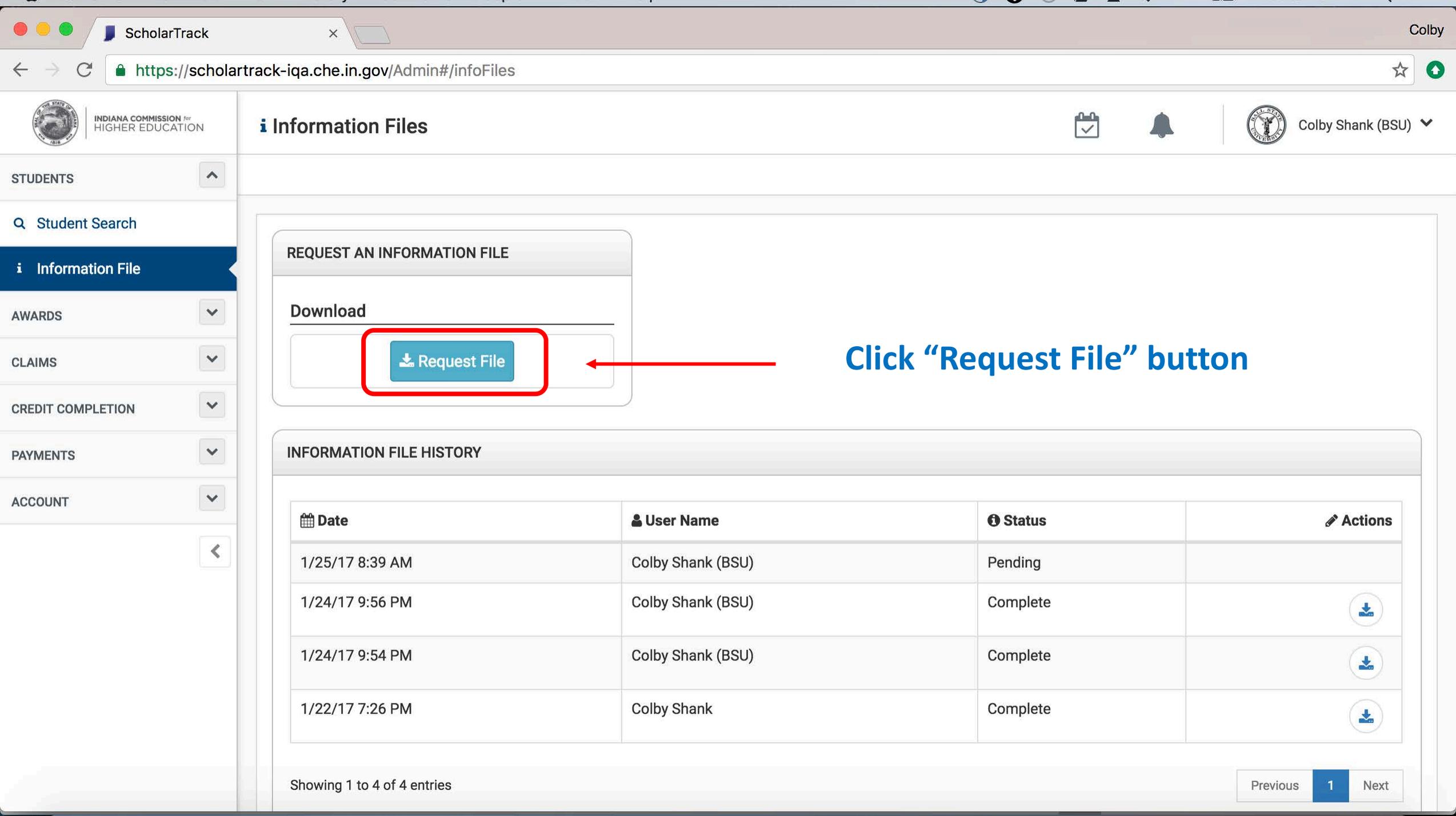
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Click "Request File" button

INFORMATION FILE HISTORY

📅 Date	👤 User Name	ℹ️ Status	✏️ Actions
1/25/17 8:39 AM	Colby Shank (BSU)	Pending	
1/24/17 9:56 PM	Colby Shank (BSU)	Complete	⬇
1/24/17 9:54 PM	Colby Shank (BSU)	Complete	⬇
1/22/17 7:26 PM	Colby Shank	Complete	⬇

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REQUEST AN I...

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INFORMATION

Request an Information File ✕

ISIR Years

2017 - 2018 ✕   Select years

Award Status

Select status

Award Types

Select types

Last Updated Since

__/__/____

Cancel   Request

📅 **Date**

✏ **Actions**

1/25/17 8:39

1/24/17 9:56

1/24/17 9:54 PM   Colby Shank (BSU)   Complete   ⬇

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Actions ✎

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Request an Information File ✕

ISIR Years

2016

2017 - 2018

2016 - 2017

2015 - **2016**

2014 - 2015

2013 - 2014

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ISIR Years

| 2016 - 2017 ✕ | Select years |

Award Status

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Award Types

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Cancel   Request

📅 Date   ✏ Actions

1/25/17 8:39

1/24/17 9:56

1/24/17 9:54 PM   Colby Shank (BSU)   Complete   ⬇

1/22/17 7:26 PM   Colby Shank   Complete   ⬇

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1/24/17 9:56 PM	Colby Shank (BSU)	Complete	⬇
1/24/17 9:54 PM	Colby Shank (BSU)	Complete	⬇
1/22/17 7:26 PM	Colby Shank	Complete	⬇

Requesting a
Credit Completion File

Q **Student Search**

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✔ Report Credit Completion

≡ Report Credit Bank

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Q Search Students

Please Press Search to Apply Current

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Stephen Martino

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REPORTS

ACCOUNT

CREDIT COMPLETION

REPORT INDIVIDUAL CREDIT COMPLETION

IMPORT CREDIT COMPLETION DATA

Upload

Upload

Download

⬇ Request File

CREDIT COMPLETION HISTORY

Import History	Request History

🗓 Date	👤 User Name	ℹ Status	✎ Actions
No data available in table			

Previous Next

Request Credit Completion File   ✕

- ⊟ Indiana University Bloomington
  - ⊟ 2016 - 2017
    - ☐ Summer 2017
    - ☑ Term 1
    - ☑ Term 2
  - ⊞ ☐ 2017 - 2018
- ⊞ ☐ Indiana University East
- ⊞ ☐ Indiana University Kokomo
- ⊟ Indiana University Northwest
  - ⊟ 2016 - 2017
    - ☐ Summer 2017
    - ☑ Term 1
    - ☑ Term 2
- ⊞ ☐ Indiana University South Bend
- ⊞ ☐ Indiana University Southeast
- ⊞ ☐ Indiana University–Purdue University Columbus
- ⊞ ☐ Indiana University–Purdue University Indianapolis

Cancel   **Request**

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🔔 👤 Stephen Martino ⌄

STUDENTS ⌄

AWARDS ⌄

CLAIMS ⌄

CREDIT COMPLETION ⌃

✔ Report Credit Completion

▤ Report Credit Bank

PAYMENTS ⌄

REPORTS ⌄

ACCOUNT ⌄

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CREDIT COMPLETION

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CREDIT COMPLETION HISTORY

Import History | Request History

📅 Date	👤 User Name	❶ Status	✏ Actions
6/13/17 6:21 AM	Colby Shank	In Queue	
5/25/17 8:54 AM	Stephen Martino	Complete	⬇

Preparing the Credit Completion File

Save file as CSV and include the following fields:

- **First Name, Last Name, SSN, DOB**
- **Institution Code**
- **Academic Year ("2016" for 2016-2017 academic year)**
- **Calendar (typically "Standard" for most institutions)**
- **Term ("Spring 2017" or "Term 2")**
- **Local Hours Earned**
- **Cumulative GPA**

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Uploading a
Credit Completion File

✔ **Report Credit Completion**

Stephen Martino ⌄

STUDENTS ⌄

AWARDS ⌄

CLAIMS ⌄

CREDIT COMPLETION ⌃

✔ Report Credit Completion

🗇 Report Credit Bank

PAYMENTS ⌄

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CREDIT COMPLETION

REPORT INDIVIDUAL CREDIT COMPLETION

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Stephen Martino ▼

STUDENTS ▼

AWARDS ▼

CLAIMS ▼

CREDIT COMPLETION ▲

✔ Report Credit Completion

📚 Report Credit Bank

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CREDIT COMPLETION

REPORT INDIVIDUAL CREDIT COMPLETION

IMPORT CREDIT COMPLETION DATA

Upload

Upload   import.csv   ⬆ Import

Download

⬇ Request File

CREDIT COMPLETION HISTORY

| Import History | Request History |

📅 Date	👤 User Name	ℹ Status	✏ Actions
6/13/17 6:21 AM	Colby Shank	In Queue	
5/25/17 8:54 AM	Stephen Martino	Complete	⬇

Requesting a Credit Bank File

Q **Student Search**

STUDENTS ∨

AWARDS ∨

CLAIMS ∨

CREDIT COMPLETION ∧

✔ Report Credit Completion

☰ Report Credit Bank

PAYMENTS ∨

REPORTS ∨

ACCOUNT ∨

Q Search Students

Please Press Search to Apply Current

‹

Preparing the Credit Bank File

Save file as CSV and include the following fields:

- **First Name, Last Name, SSN, DOB**
- **Institution Code**
- **AP/IB Hours**
- **Credit Hours Earned Before High School Graduation**

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Common File Issues

Error While Uploading File

- **Is your file a CSV?**

- **Does your file have column headers?**

- **Does your file contain all necessary column headers?**

- **Are the column headers spelled and capitalized EXACTLY as the file layout specifies?**

- **Is there any weird data entered in the file?**
  - **Rows with incomplete data**
  - **Fields with values that are not compliant with the file layout**

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Unable to find student

- **SSN, Date of Birth, and Last Name must be perfect match for Claim File and current Credit Completion and Credit Bank processing.**

- **Verify student identifiers have not changed in ScholarTrack.**

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Claim amount is higher than allowed amount

- Error message will tell you maximum allowed amount

- Claim exceeds 50% of remaining balance if first term claimed

- Claim exceeds remaining balance if subsequent term

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Student Portal

- **Undergoing some design changes to improve user experience before award notifications are sent to students. Stay tuned!**

- **Students will be able to:**
  - **Apply for state financial aid using Application Wizard**
  - **View state financial aid award offers (including award letter)**
  - **View Credit Completion status and progress**
  - **Request Credit Completion and Credit Bank data if missing**
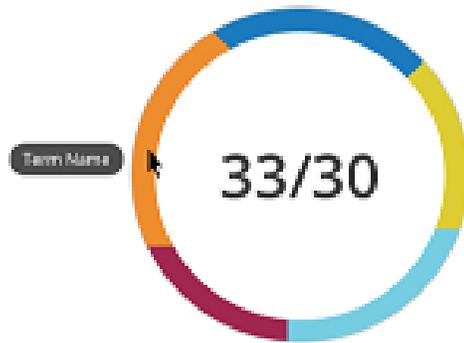 - **File state financial aid appeals**

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Credit Completion

Overview | Hours | Credit Bank

33/30

Term Name

ℹ 3 hours will be added to your credit bank

My Awards

21st Century Scholars	10/10	✔ eligible
Frank O'Bannon	18/18	✔ full time
	3/3	✔ on time
Next Generation Hoosier Educators Scholarship	2/2	✔ eligible

Credit Completion

Select School & Year:

Indiana Univ-Purdue Univ Indpls ▼   Year ▼

Term	Hours	Cumulative GPA
Fall (Standard) 8/24/2016 - 12/18/2016	10	3.9
Spring (Standard) 1/1/2017 - 5/6/2017	12	3.85
Summer (Standard) 5/16/2017 - 8/12/2017	6	3.7

Lorem ipsum dolor sit amet, consectetur adipiscing?

REQUEST HOURS

Credit Completion

| | Overview | Hours | **Credit Bank** |

AP/IB Hours	+ 20 hours
Dual Credit Hours	+ 57 hours
Credit Hours Earned in Excess of 30	+ 29.5 hours
Pre-Populated Hours	+ 0 hours
Credit Bank Adjustment	+ 0 hours
Reserved for Award Creation	- 0 hours
Used for Awards	- 5 hours

Questions?