



ISFAA Winter Conference 2019

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Agenda

- **ScholarTrack**
 - **Edit Overrides and the Overrides File**
 - **ISIR Overrides & ISIR Transaction Logic**
 - **Reporting Credit Completion and Credit Bank Data**
 - **ISIR Requests**
 - **Annual Awards**
 - **Review Teaching Stipend Applicants**
 - **Two-Factor Authentication**



Edit Overrides & the Override File

Edit Overrides

- **Which Edits can a college user override?**
 - Edit 03: Not a first-time undergraduate.
 - Edit 11: Not a U.S. Citizen or Eligible Non-citizen.
 - Edit 17: Default on federal student loan and/or overpayment of federal grant.
 - Edit 22: Mailing address not IN and no edit 02.
 - Edit 28: Independent status caused by Emancipated Minor or In Legal Guardianship status.




Override File

- **What actions can be performed using the Override file?**
 - Can use to override edits for students, in bulk.
 - Can set an ISIR override.
 - Can also set the Associate Degree Flag.



Override File

**INDIANA COMMISSION for HIGHER EDUCATION**

Override Files Calendar Notifications 6

STUDENTS ^

- Student Search
- Information File
- ISIR Requests
- Overrides**
- AWARDS
- CLAIMS
- CREDIT COMPLETION
- PAYMENTS
- REPORTS
- ACCOUNT

IMPORT DETAILS

Upload

Download

IMPORT HISTORY

| Date | User Name | Schools | Status | Actions |
|----------------------------|-----------|---------|--------|---------|
| No data available in table | | | | |

Showing 0 to 0 of 0 entries



ISIR Overrides & ISIR Transaction Logic

ISIR Overrides

- **How do I select a different ISIR for EFC and Dependency Status?**
 - ISIR Transactions Widget - use the transaction drop-down menu to select the transaction you wish to override.
 - Note that if a transaction does not contain a Primary EFC, you won't be able to select that transaction in the ISIR override process.

| Primary EFC | Dependency Status | Source | Actions |
|-------------|-------------------|-----------|---------|
| \$0 | Dependent | Applicant | |



ISIR Overrides

- **When do I select a different ISIR for EFC and Dependency status?**
 - If you have verified a particular transaction/EFC, you may place an override on that transaction so future applicant-submitted transactions won't be considered.



ISIR Overrides

- **When is an override automatically placed on a school-submitted transaction?**
 - If the following conditions are met:
 - ISIR transaction has a Primary EFC calculated.
 - ISIR transaction is from an active school in ScholarTrack.
 - ISIR transaction meets one or more of the following criteria:
 - EFC Change Flag = 1 (EFC Increase) or 2 (EFC Decrease)
 - Dependency Override Indicator = 1 (Dependent to Independent) or 4 (Homeless Youth Determination)
 - Professional Judgment Indicator = 1 (EFC adjustment processed)



ISIR Transaction Logic

- **How does ScholarTrack determine which ISIR transaction to use in determining edits?**
 - For most edits, the latest ISIR transaction will always be used. This applies to edits 02, 03, 08, 11, 17, 22, 29.
 - For other edits, we use the latest overridden ISIR transaction. If no overridden ISIR transactions exist, we use the latest ISIR transaction. This applies to edits 05, 14, 20, 25, 28.



ISIR Transaction Logic

- **How does ScholarTrack determine which ISIR transaction to use in determining EFC and Dependency Status?**
 - We use the latest overridden ISIR transaction with a Primary EFC.
 - If no overridden ISIR transaction exists, we use the latest student or CPS ISIR transaction with a Primary EFC.



Reporting Credit Completion and Credit Bank Data

Reporting Credit Completion Data

- **When should Credit Completion Data be reported in ScholarTrack?**
 - Report this data no later than two (2) weeks after grades are posted for the term at your institution.
 - Report for all students on your file – even if they no longer attend or have never attended your institution. Blank Record = Not Reported.
 - As grades change for students (grade appeals, incompletes, etc.), report updated hours for past terms.
 - Be responsive to student requests.



Reporting Credit Bank Data

- **Who should report Credit Bank hours?**
 - The institution where hours were earned (Dual Credits) 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.



ISIR Requests

Requesting ISIRs in ScholarTrack

- From the ISIR Transaction Widget:

ISIR TRANSACTIONS

#1 - Completed 03/09/2017

+ Request ISIR

Transaction Data

| Primary EFC | Dependency Status | Source | Actions |
|-------------|-------------------|-----------|---------|
| \$0 | Dependent | Applicant | + |



Requesting ISIRs in ScholarTrack

- **From the ISIR Requests Page:**
 - You have the ability to upload a file of students for whom you know that ISIR transactions are missing. This will get sent to CPS on a weekly basis.

The screenshot displays the 'ISIR Requests' page in the ScholarTrack system. On the left, a sidebar contains navigation links for 'STUDENTS', 'AWARDS', 'CLAIMS', 'CREDIT COMPLETION', 'PAYMENTS', and 'REPORTS'. The 'ISIR Requests' link is selected. The main area features two tabs: 'Requests' and 'Imports'. An 'Upload' button is highlighted with a red box. To the right, a 'Blank Template' button is also highlighted with a red box. Below these buttons is a table with columns for 'Date', 'User Name', 'Status', and 'Actions'. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'. There are 'Previous' and 'Next' navigation buttons at the bottom right of the table area.



Annual Awards

Annual Awards

- An annual award offer is an award offer that runs at least one year in length. For example, an award for a student who has never used state aid will by default run 7/1/2018 - 6/30/2019.
- Once an award offer is claimed, the award start date will reflect the start date of the first term claimed. The award end date will reflect a date one year later than the award start date.
- Subsequent annual award offers begin one day after the previous year's annual award offers expire.



Annual Awards

- **Scenario 1:**
 - A student has never used state financial aid. The award offer therefore runs 7/1/2018 - 6/30/2019 until a claim is made.



21st Century Scholarship



Award Status Ready to Claim

Award Start Date 07/01/2018

Award Expiration Date 06/30/2019

Amount Offered \$9,896

Amount Claimed by Your Institution \$0

Amount Claimed by Other Institutions \$0

Remaining Balance \$9,896

Percentage Used 0%

Annual Awards

- **Scenario 2:**

- A student's award runs from 7/1/2018 – 6/30/2019. However, the student does not attend in Fall 2018 (or attends less than full-time), so the award is first claimed in Spring 2019. This sets the award window as January 2019 – January 2020 allowing the student a full 12 months to meet the credit completion requirement.



21st Century Scholarship



Award Status Ready to Claim

Award Start Date 07/01/2018

Award Expiration Date 06/30/2019

Amount Offered \$9,896

Amount Claimed by Your Institution \$0

Amount Claimed by Other Institutions \$0

Remaining Balance \$9,896

Percentage Used 0%

21st Century Scholarship



Award Status Ready to Claim

Award Start Date 01/07/2019

Award Expiration Date 01/06/2020

Amount Offered \$9,896

Amount Claimed by Your Institution \$4,948

Amount Claimed by Other Institutions \$0

Remaining Balance \$4,948

Percentage Used 50%

Annual Awards

- **Scenario 3:**
 - A student's award runs from 8/21/2018 - 8/20/2019. The award is first claimed in Fall 2018, and the award window does not change (Fall - Fall).



21st Century Scholarship



Award Status Ready to Claim

Award Start Date 08/21/2018

Award Expiration Date 08/20/2019

Amount Offered \$9,896

Amount Claimed by Your Institution \$0

Amount Claimed by Other Institutions \$0

Remaining Balance \$9,896

Percentage Used 0%

21st Century Scholarship



Award Status Ready to Claim

Award Start Date 08/20/2018

Award Expiration Date 08/19/2019

Amount Offered \$9,896

Amount Claimed by Your Institution \$4,948

Amount Claimed by Other Institutions \$0

Remaining Balance \$4,948

Percentage Used 50%

Annual Awards

- **Ready to Claim status:**
 - Indicates the student is offered an award. If the college determines the student is eligible, the award offer can be applied to the student's account and can be claimed in ScholarTrack.
- **Award Offered status:**
 - Indicates the student is offered an award. If the college determines the student is eligible, the award offer can be applied to the student's account, but it cannot yet be claimed in ScholarTrack.



Annual Awards

21st Century Scholarship

| | |
|--------------------------------------|----------------|
| Award Status | Ready to Claim |
| Award Start Date | 01/16/2019 |
| Award Expiration Date | 01/15/2020 |
| Amount Offered | \$4,369 |
| Amount Claimed by Your Institution | \$0 |
| Amount Claimed by Other Institutions | \$0 |
| Remaining Balance | \$4,369 |
| Percentage Used | 0% |

21st Century Scholarship

| | |
|-----------------------|---------------|
| Award Status | Award Offered |
| Award Start Date | 08/20/2019 |
| Award Expiration Date | 08/19/2020 |



Annual Awards

- **On Hold status:**
 - Awards are placed 'On Hold' when an issue exists that prevents claiming but not award creation. Do not apply these award offers to student accounts until the issue is resolved.



Annual Awards

- The following issues cause an award to be placed '**On Hold**':
 - **Edit 02:** Not an Indiana Resident - If an award was previously claimed, and the student updated their FAFSA to reflect that they are no longer a resident of Indiana, the award would change to 'On Hold' to prevent future claims.
 - **Edit 03:** Not a first-time undergraduate - If an award was previously claimed for a student who updated their FAFSA to reflect graduate student status, the award would change to 'On Hold' to prevent future claims.



Annual Awards

- The following issues cause an award to be placed '**On Hold**':
 - **Edit 17:** Default on federal student loan and/or overpayment of federal grant - When comment codes 254, 255, and 256 are present on the ISIR, Edit 17 is applied. This can be overridden when the student confirms that they are no longer in default or they have repaid the overpayment of federal grant money. Award will be placed 'On Hold' until resolved.
 - **Edit 22:** Mailing address not IN and no edit 02 - If a student has indicated they are an Indiana resident but provided an out-of-state mailing address, their award will be placed 'On Hold' until their information is corrected.



Annual Awards

- The following issues cause an award to be placed '**On Hold**':
 - **Edit 28**: Independent status caused by Emancipated Minor or In Legal Guardianship status - The student must verify their status with their institution before this edit can be overridden. Award will be 'On Hold' until edit is overridden.
 - Next Generation Hoosier Educators Scholarship will be 'On Hold' until the **Promissory Note** is signed by the student.



Annual Awards

Frank O'Bannon Grant

| | |
|--------------------------------------|------------|
| Award Status | On Hold |
| Award Start Date | 06/25/2018 |
| Award Expiration Date | 06/24/2019 |
| Amount Offered | \$4,200 |
| Base Amount | \$3,400 |
| Honors Incentive Amount | \$800 |
| Credit Completion Status | On-Time |
| Amount Claimed by Your Institution | \$510 |
| Amount Claimed by Other Institutions | \$0 |
| Remaining Balance | \$3,690 |
| Percentage Used | 12% |



Annual Awards

- **Former Offer status:**
 - An award status will reflect ‘Former Offer’ when the following is true:
 - An alternative award has been claimed or there is a greater award offer available to the student; or
 - An edit has been applied due to an updated FAFSA transaction, and the student is no longer eligible for the award. Any claims must be refunded.



Annual Awards

Frank O'Bannon Grant







| | |
|--------------------------------------|-------------------------|
| Award Status | Former Offer |
| Award Start Date | 01/16/2019 |
| Award Expiration Date | 01/15/2020 |
| Status | Alternate Award Offered |
| Base Amount | \$3,400 |
| Honors Incentive Amount | \$800 |
| Credit Completion Status | On-Time |
| Amount Claimed by Your Institution | \$0 |
| Amount Claimed by Other Institutions | \$0 |
| Percentage Used | 0% |



Annual Awards

- **No Award Offered:**

- This indicates that a student is not eligible for an award. This can be a result of an EFC being too high, the student not meeting credit completion, or an Edit being present that prevents award creation (such as 01: Late FAFSA).

| Frank O'Bannon Grant  | |    |
|--|--------------------------------|---|
| Award Status | No Award Offered | |
| Award Start Date | 06/25/2019 | |
| Award Expiration Date | 06/24/2020 | |
| Status | Did Not Meet Credit Completion | |
| Credit Completion Status | Not Eligible | |



Annual Awards

21st Century Scholarship



| | |
|--------------------------------------|----------------|
| Award Status | Ready to Claim |
| Award Start Date | 01/16/2019 |
| Award Expiration Date | 01/15/2020 |
| Amount Offered | \$4,369 |
| Amount Claimed by Your Institution | \$0 |
| Amount Claimed by Other Institutions | \$0 |
| Remaining Balance | \$4,369 |
| Percentage Used | 0% |

Frank O'Bannon Grant



| | |
|--------------------------------------|-------------------------|
| Award Status | Former Offer |
| Award Start Date | 01/16/2019 |
| Award Expiration Date | 01/15/2020 |
| Status | Alternate Award Offered |
| Base Amount | \$3,400 |
| Honors Incentive Amount | \$800 |
| Credit Completion Status | On-Time |
| Amount Claimed by Your Institution | \$0 |
| Amount Claimed by Other Institutions | \$0 |
| Percentage Used | 0% |



Annual Awards

- **Expired status:**
 - Indicates that the award end date has passed and the award can no longer be used for future terms.
 - You can still claim if it is expired but before your reconciliation deadline.
 - If it is beyond your reconciliation deadline, you may claim up to 180 days beyond the deadline, but the claim will be placed ‘On hold’ for review. This allows us to review and ensure that the claim was correctly applied and is okay to release.



Annual Awards

- **Why is a prior year FAFSA being used to calculate a current award?**
 - i.e. a Spring 2018 start student also attends Fall 2018. Their award for that period (January - January) is based on the 2017-2018 FAFSA. Why?
 - They began using aid during the 2017-2018 award year. Since awards are on an annual cycle, we are looking to the FAFSA that corresponds to the year the student first used state aid.





Reviewing Student Teaching Stipend Applicants



Reviewing Student Teaching Stipend Applicants

- Spring 2019 Stipend applications are available for review in ScholarTrack for College Financial Aid, College Admin, and College Support users under “Awards” > “Manage Awards.”
- Please work with your schools of education to verify whether your institution’s applicants are eligible for the awards pursuant to [IC 21-13-7](#) (Student Teaching Stipend for High-Need Fields) and [IC 21-13-8](#) (Earline S. Rogers Student Teaching Stipend for Minorities).
- If an applicant is attending your institution, please mark the application as “Approved” or “Denied.” If the applicant is not attending your institution, please mark the applicant as “Not Here.”



Reviewing Student Teaching Stipend Applicants

- **Student Teaching Stipend for High-Need Fields Application Requirements (IC 21-13-7):**
 - (1) is a student who is enrolled in a course of study at an eligible institution that would enable the student, upon graduation, to teach in an accredited school in Indiana in:
 - (A) special education; or
 - (B) a high-need field;
 - (2) will participate in student teaching as part of the student's degree requirements;
 - (3) has earned a cumulative grade point average upon entering student teaching that:
 - (A) is required by an eligible institution for admission to the eligible institution's school of education; or
 - (B) is at least a 2.0 on a 4.0 grading scale or its equivalent as determined by the eligible institution, if the eligible institution's school of education does not require a certain minimum cumulative grade point average;
 - (4) agrees, in writing, to apply for a teaching position at an accredited school in Indiana following the student's certification as a teacher, and, if hired, to teach for at least three (3) years; and
 - (5) meets any other minimum criteria established by the commission.



Reviewing Student Teaching Stipend Applicants

- **The Commission defines “high-need fields” as:**
 - Special Education
 - Middle School Math
 - Middle School Science
 - High School Math
 - High School Science



Reviewing Student Teaching Stipend Applicants

- **Earline S. Rogers Student Teaching Stipend for Minorities Application Requirements (IC 21-13-8):**
 - (1) is a minority student enrolled in an eligible institution;
 - (2) will participate in:
 - (A) student teaching as part of the student's degree requirements; or
 - (B) a school administration internship as part of the student's graduate degree program;
 - (3) has earned a cumulative grade point average
 - (A) upon entering student teaching that:
 - (i) is required by an eligible institution for admission to the eligible institution's school of education;
 - (ii) is at least a 2.0 on a 4.0 grading scale or its equivalent as determined by the eligible institution, if the eligible institution's school of education does not require a certain minimum cumulative grade point average; or
 - (B) upon beginning a school administration internship that is at least 3.0 on a 4.0 scale, or its equivalent as determined by the eligible institution;
 - (4) agrees, in writing, in the case of an individual entering student teaching, to apply for a teaching position at an accredited school in Indiana following the student's certification as a teacher, and, if hired, to teach for at least three (3) years; and
 - (5) meets any other minimum criteria established by the commission.

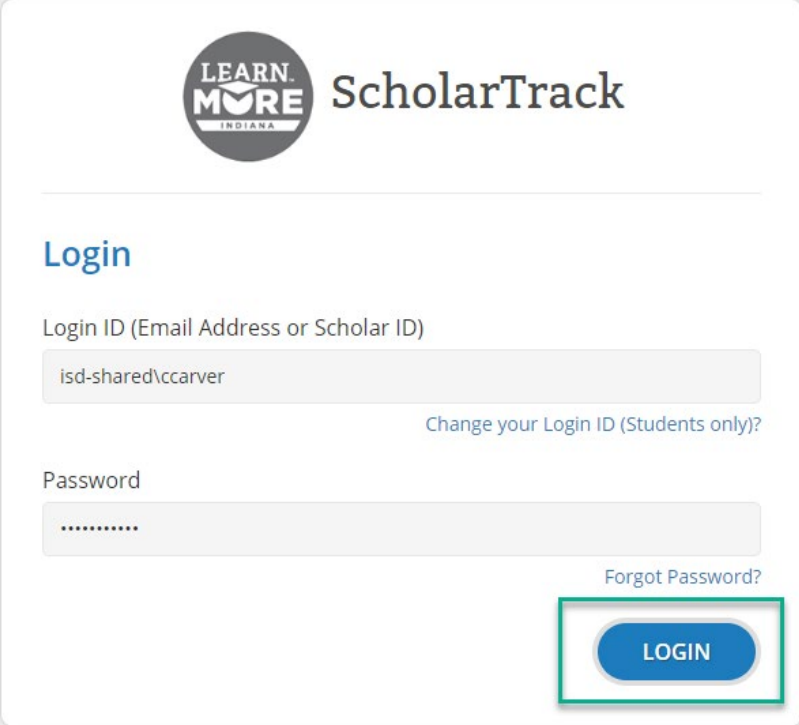




Two-Factor Authentication



Two-Factor Authentication



The image shows a login form for ScholarTrack. At the top left is the logo for LEARN MORE INDIANA. To its right is the text "ScholarTrack". Below this is a horizontal line. Underneath the line is the word "Login" in blue. There are two input fields: "Login ID (Email Address or Scholar ID)" containing the text "isd-shared\ccarver" and "Password" containing a series of dots. To the right of the Login ID field is a link "Change your Login ID (Students only)?". To the right of the Password field is a link "Forgot Password?". Below the input fields is a blue "LOGIN" button with a white border. At the bottom of the form area is the text "Don't have a ScholarTrack account? Create one.".




Two-Factor Authentication



ScholarTrack

Register for Two-Factor Authentication

Symantec Credential ID 

Symantec Security Code 

[< back](#)

CONFIRM



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Two-Factor Authentication

Symantec Credential ID ×

Please enter the Credential ID associated with your Symantec-compatible hard or soft token to register the device with your ScholarTrack user account.

If using the [Symantec VIP mobile application](#) (soft token), the Credential ID is visible at the top of the application when the application opens.

If using the [Symantec VIP desktop application](#) (soft token), the Credential ID is visible in the lower-right corner of your display.

If using a hard token, the Credential ID often appears as the "S/N" on the back of the device.

You can view a full list of compatible devices at https://support.symantec.com/en_US/article.TECH239895.html

Cancel

Symantec Security Code ×

Please enter the six-digit Security Code associated with your Symantec-compatible hard or soft token registered with your ScholarTrack user account.

If you are trying to enter a Security Code from a token other than the one you initially registered with ScholarTrack, please contact the ScholarTrack Admin user associated with your organization for assistance.

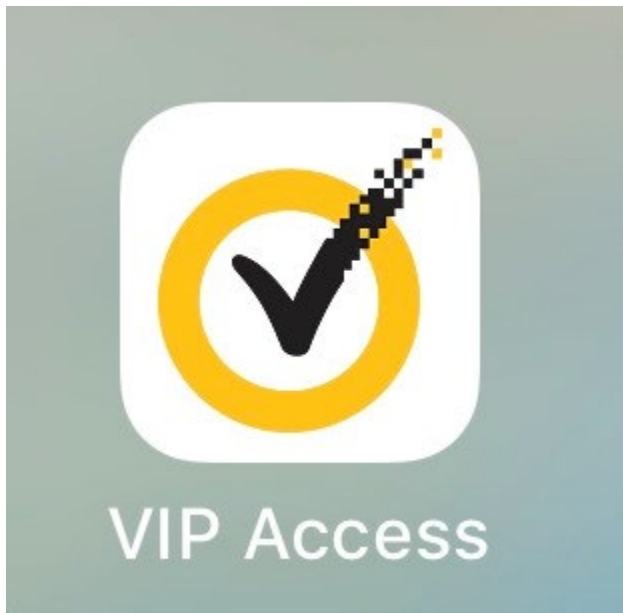
Cancel



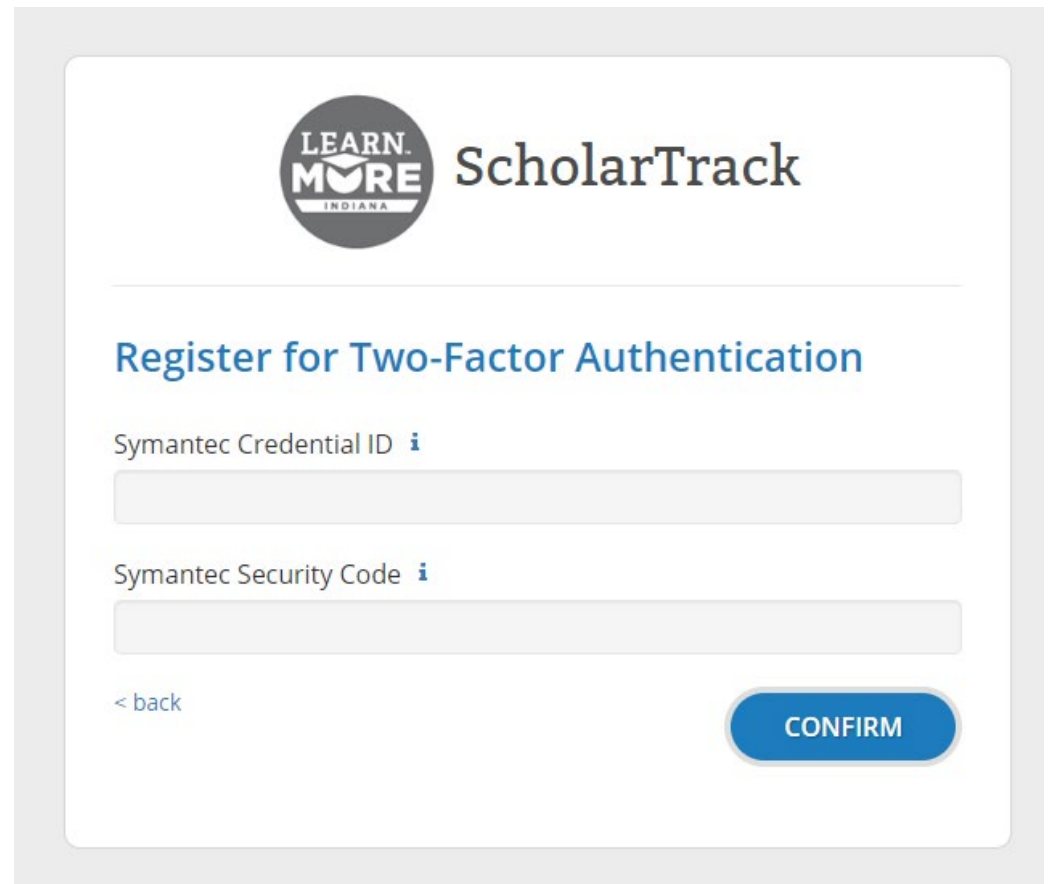
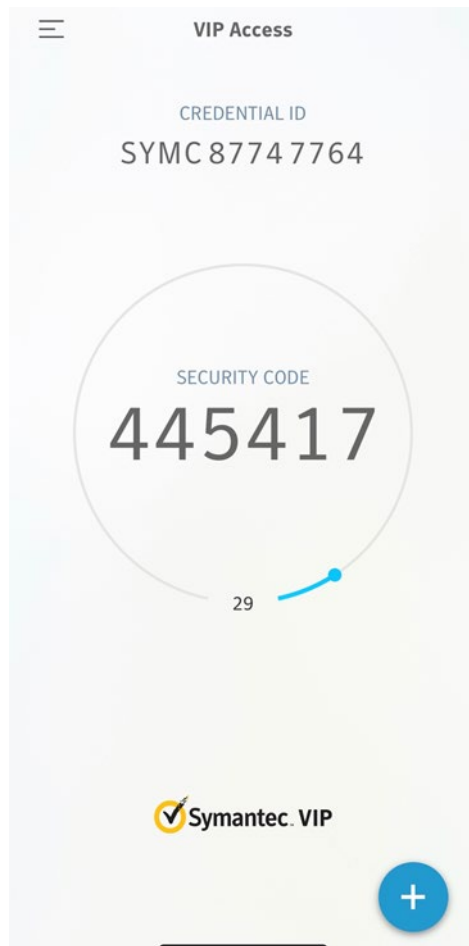
INDIANA COMMISSION for
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Two-Factor Authentication

- Soft Token
 - VIP Access App on Mobile Device



Two-Factor Authentication



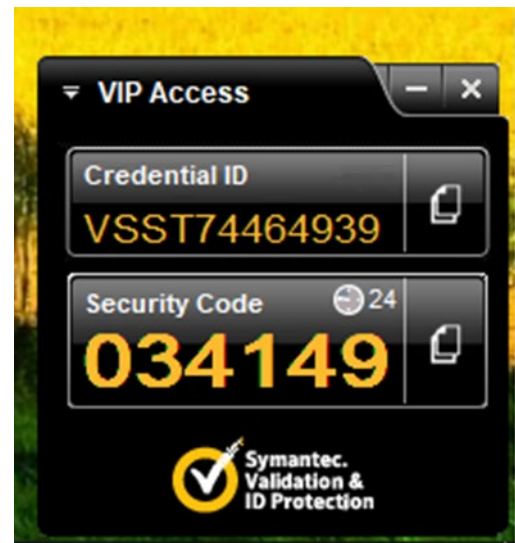
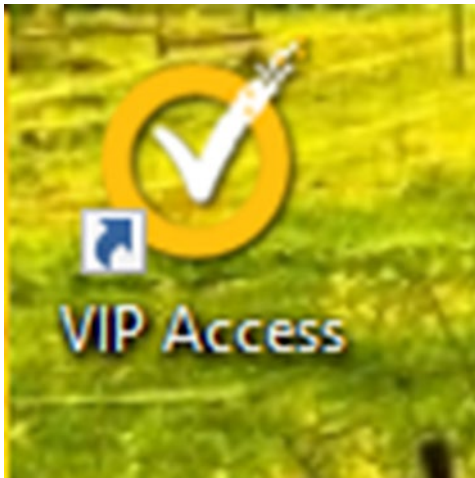
Two-Factor Authentication

- Hard Token
 - Can also use hard token that you already use to log into FAA Access to CPS Online. The credential ID can be found on the back of the token.



Two-Factor Authentication

- Desktop Application
 - Can download VIP Access on your Desktop and access your credential and security code through that app.





Questions?

