Northwestern
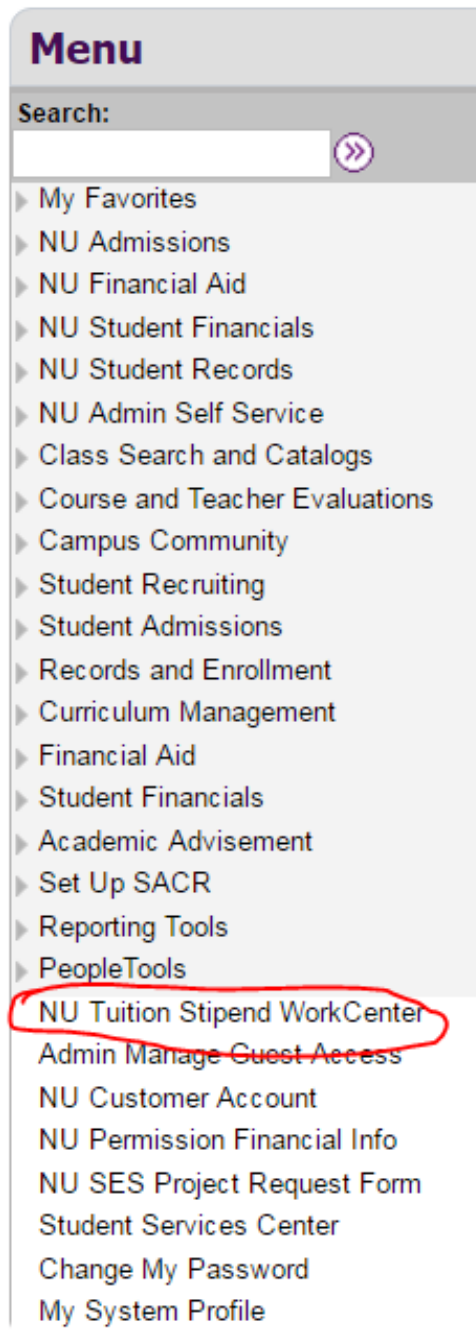## THE GRADUATE SCHOOL
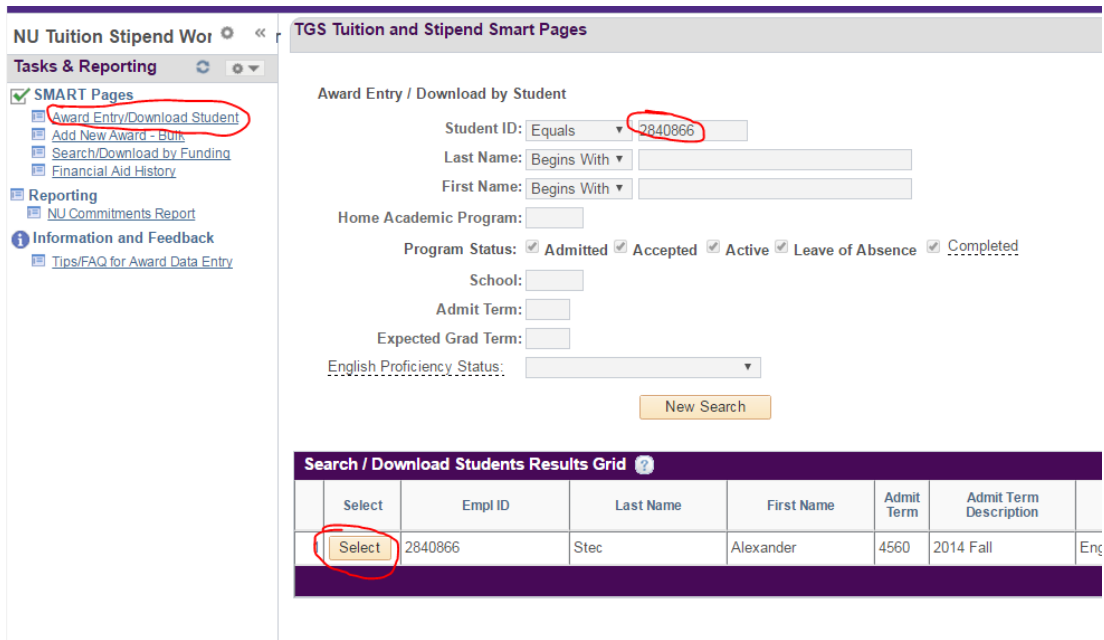
Student Funding Entry Quick Guide

Funding Entry and Edits in Smart Pages

- Log into CAESAR/SES and click on Classic Home. Click on NU Tuition Stipend WorkCenter (aka Smart Pages) on the main menu.
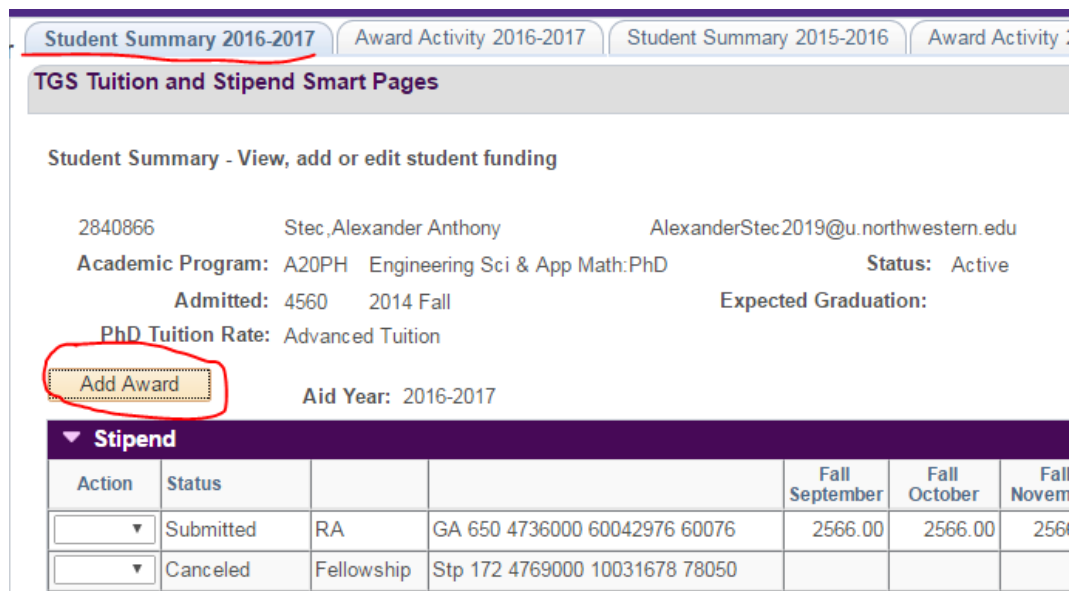
Menu

Search:

- My Favorites
- NU Admissions
- NU Financial Aid
- NU Student Financials
- NU Student Records
- NU Admin Self Service
- Class Search and Catalogs
- Course and Teacher Evaluations
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advisement
- Set Up SACR
- Reporting Tools
- PeopleTools
- NU Tuition Stipend WorkCenter
- Admin Manage Guest Access
- NU Customer Account
- NU Permission Financial Info
- NU SES Project Request Form
- Student Services Center
- Change My Password
- My System Profile

Search using "Award Entry/Download Student"

- Choose "Award Entry/Download Student."
- Enter your desired criteria and click "Search."
- Searching by a single EmplID leads directly to that student's Student Summary screen.
- Searching by an academic program returns one line each for all of the students in the program.
- If multiple students are returned click on "Select" to enter the student's Student Summary screen.
- Download results to an Excel spreadsheet by clicking 📊 in the top right corner of the Search/Download Students Results Grid.

Add funding for a student

- Choose "Award Entry/Download Student" to search for a student.
- Ensure you are on the correct aid year by clicking on the appropriate tab at the top (i.e. "Student Summary 2016-2017").
- Click on the "Add Award" button if the award is not already listed below for the student. If the award is already listed, follow the Edit a Single Award instructions below.

- Select the Aid Year by selecting the appropriate radial button.
- Choose Item Type. Click the magnifying glass to search by chart string or item type description. If you already know the item type, you can enter it in directly and skip the search.

Add New Award -
Student

2840866   Stec,Alexander Anthony   A
Academic Program: A20PH   Engineering Sci & App Math:PhD
Admitted: 4560   2014 Fall
PhD Tuition Rate: Advanced Tuition

Select Aid Year

◉ Aid Year: 2016-2017   ○ Aid Year: 2015-2016

Funding Source

○ Anticipated funding type:
◉ Item Type: 6171951   🔍

[Exit without saving]

- If you use the lookup, select the Item Type Description which starts with GA or STP for stipends, or Grant for tuition.
- If you chose the stipend item type, a grid with 12 months will load. Enter the amounts per month as needed. Use "Populate all amounts" to fill the amount entered in the first box into all boxes if you want to apply the funding for the entire year. You can use copy and paste to apply the funding to multiple months/quarters. If desired, you can add comments.
- Click on "Save and Submit" if you are ready to submit the entries. Click "OK" on the next screen. If you wish to discard your entries, click on "Exit without saving" and then click "Cancel".

Add New Award - Student

2840866   Stec,Alexander Anthony   AlexanderStec2019@u.northwestern.edu
Academic Program: A20PH   Engineering Sci & App Math:PhD   Status: Active   ELP Status: Not required (US citizen)
Admitted: 4560   2014 Fall   Expected Graduation:
PhD Tuition Rate: Advanced Tuition

Select Aid Year

◉ Aid Year: 2016-2017   ○ Aid Year: 2015-2016   **** This Aid Year is currently closed.
       Please contact the TGS Financial Aid Office at tgs-fa@northwestern.edu for assistance.

Funding Source

○ Anticipated funding type:
◉ Item Type: 000006222079   🔍   GA 620 4731000 60038186 60076

Fund	Department	Project	Chartfield 1	Account	Activity ID
620	4731000	60038186		60076	01

Amounts and Dates   Budget Start: 09/01/2014   Budget End: 07/31/2017   Activity Start: 09/01/2014   Activity End: 03/31/2017

Stipend Amounts and Dates

$2566.00	$2566.00	$2566.00	$2566.00	$2566.00	$2566.00
Sep	Oct	Nov	Dec	Jan	Feb
09/01/2016 09/30/2016	10/01/2016 10/31/2016	11/01/2016 11/30/2016	12/01/2016 12/31/2016	01/01/2017 01/31/2017	02/01/2017 02/28/2017

$2566.00	$2566.00	$2566.00	$2566.00	$2566.00	$2566.00
Mar	Apr	May	Jun	Jul	Aug
03/01/2017 03/31/2017	04/01/2017 04/30/2017	05/01/2017 05/31/2017	06/01/2017 06/30/2017	07/01/2017 07/31/2017	08/01/2017 08/31/2017

[Populate all amounts]   Amount   30792.00

Add Comments (254 characters)

Should tuition follow stipend?
◉ Yes ○ No

[Exit without saving]   [Save Draft]   [Save and Submit]

- In most cases after you enter stipends, the tuition entry screen will automatically open. In general, tuition should be funded on the same chartstring(s) as the stipend. If you do not wish to enter tuition, you can exit without saving.
- Tuition funding item types return a 4 quarter grid. Enter the amounts per quarter as needed. Use "Populate all amounts" to fill the amount entered in the first box into all boxes if you want to apply the funding for the entire year. You can use copy and paste to apply the funding to multiple months/quarters. If desired, you can add comments.
- Click on "Save and Submit" if you are ready to submit the entries. Click "OK" on the next screen. If you wish to discard your entries, click on "Exit without saving" and then click "Cancel".

Edit Award - Student

2840866	Stec,Alexander Anthony	AlexanderStec2019@u.northwestern.edu

Academic Program: A20PH Engineering Sci & App Math:PhD Status: Active ELP Status: Not required (US

Admitted: 4560 2014 Fall Expected Graduation:

PhD Tuition Rate: Advanced Tuition

Select Aid Year

○ Aid Year: 2016-2017 ○ Aid Year: 2015-2016 **** This Aid Year is currently closed.
Please contact the TGS Financial Aid Office at tgs-fa@northwestern.edu for a

○ Anticipated funding type:
● Item Type: 000006167424 🔍 GA Applied Math Tuition

Fund	Department	Project	Chartfield 1	Account	Activity ID
110	1326070			78020	

Amounts and Dates

Tuition Dates and Amounts

$4202.00			
Fall	Winter	Spring	Summer
09/01/2016 📅 11/30/2016 📅	12/01/2016 📅 02/28/2017 📅	03/01/2017 📅 05/31/2017 📅	06/01/2017 📅 08/31/2017 📅

Populate all amounts	Amount	4202.00

Add Comments (254 characters)

Exit without saving	Save Draft	Save and Submit

- If needed, change start/stop dates and/or amounts per month or term (rarely used).

Edit funding

- From the Student Summary page, select Edit Award" from the drop down menu under Action to the left of the row you wish to change. You can edit both the stipend and tuition entries.
- You may edit four areas: Funding source (item type / chart string), amounts, dates, comments.
- If the edited award was saved as draft previously, you will have the options of "Save Draft" or "Save and Submit."
- If the edited award was submitted previously, the only option is "Save and Submit."
- Click "OK" on the next screen to return to the summary page.

Admitted: 4560 2
PhD Tuition Rate: Advanced

Add Award Aid Year

| ▼ Stipend		
Action	**Status**	
▼	Submitted	RA
▼	Canceled	Fellows

Cancel funding

- From the Student Summary page, choose "Cancel Award" from the drop down menu under Action to the left of the row you wish to "delete". This will delete out the entire entry, all of the months or quarters.
- Click "Yes" at the prompt "You are about to cancel this award." Click "OK" or "Cancel" at the next prompt.

  - *Notes*
    - *If you would like to cancel only specific months or terms, use "Edit award" instead of "Cancel award" – remove the months/terms as needed and submit.*
    - *If you need to add back an award previously cancelled, use "Add Award." You cannot edit a cancelled award.*

Add funding in bulk

- From the NU Tuition Stipend WorkCenter menu, Choose "Add New Award – Bulk."
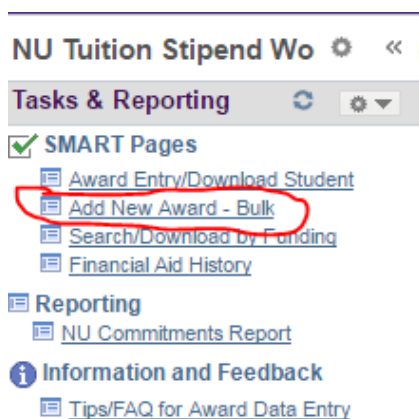
- Enter the funding as detailed above. Select aid year, select funding by item type or chart string, enter amounts. Add comments if desired.
- Add the list of students in one of two ways:
  - Upload a list of EmplIDs. Click the arrow in the "Upload list of EmplIDs" box, and then type or paste in a list of EmplIDs (one per row). This is usually the preferred method.

  - Type in or search for EmplIDs in the box shown below. Hit "Tab" or "Enter" on keyboard, and then click "+" at right to add a new row. Repeat for as many students as needed.

- The funding information copies onto each student's row. It may be edited as needed (amounts, months/terms, comments are editable per student - item type and aid year are not).
- Click on "Save and Submit."

  Notes: Only new awards may be added in bulk; it is not possible to edit or cancel awards in bulk. If you need to edit an award you need to edit using the "edit by single award" method.

Search by funding

- Choose "Search/Download by Funding."
- This search method returns multiple rows per student.
- Enter your desired criteria; "Search." Search criteria includes search by chartstring, by student, by academic program, by school etc.
- Click "Edit" to pull up the Edit Award-Student page for a particular student.
- Download results to a spreadsheet by clicking ▦ in the top right corner.

Validate funding

- *Validation indicates if awards have errors that might affect payment. This is particularly important before the Interface.*
- Under the results grid from "Search/Download by Funding" click "Validate Awards."
- Allow validation to run (20-30 seconds) then click "Display Results."

- Once the results grid appears click "Refresh" until the "Complete" column shows a green checkmark or red exclamation point per row.
- The more awards being validated, the longer this process may take to complete.
- "NA" means validation was not relevant (e.g., "project dates" on designated funding).
- A "Fail" on any of the columns below means the award may not be disbursed or paid:

Aid year activation	*Student is activated for the Financial Aid year*
FA term	*Student has a Financial Aid term built*
Budget	*Student has a Financial Aid budget built*
Project dates	*Dates of award are within the activity start/end dates*
Chart string	*The chart string is not closed/held, passes other checks*
Award validation process	*The student's entire award package (including loans) pass validation*
Complete	*The validation process completed*

- Download results to a spreadsheet by clicking ▦ in the top right corner of the Search/Download Student Awards Results Grid.