Quick Guide to Using the Smart Pages in SES

December 2013; j-phelan@northwestern.edu

**Navigation**

*NU Tuition Stipend WorkCenter* is found in the left-hand navigation of SES

**Payroll changes**

Must still be made on paper to Payroll after the initial Fall interface for those awards with item types beginning with “62”.

**Support**

Please contact tgs-fa@northwestern.edu for further assistance

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**Search, download awards by student**

returns one row per student

Choose “Award Entry/Download Student.”

1. Enter your desired criteria; “Search.”
   - Searching by a single EmplID leads directly to that student’s summary/edit screen.
   - If multiple students are returned “Select” leads to a given student’s summary/add screen.

2. Download results to a spreadsheet by clicking ![ ] in the top right corner.

**Note**

- Downloads in Internet Explorer are inconsistent depending on browser version. Please use another browser if needed or contact tgs-fa@northwestern.edu for further assistance.
  Depending upon browser, you may need to hold the control key when clicking on the download icon.

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**Search by funding, validate already-entered funding**

returns one row per award

Choose “Search/Download by Funding.”

1. Enter your desired criteria; “Search.”

2. Download results to a spreadsheet by clicking ![ ] in the top right corner.

**Validate awards**

validation indicates if awards have errors that might affect payment

1. Under the results grid from Step #2 click “Validate Awards.”

2. Allow validation to run (20-30 seconds) then click “Display Results.”

3. 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**: Student’s entire award package (incl. loans) validates
     - **Complete**: The validation process completed

4. Download results to a spreadsheet by clicking ![ ] in the top right corner.

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Add a single award

Choose “Award Entry/Download Student.” Search for a student.

Choose “Add Award” from the student’s summary page.
1. Choose award year.
2. Choose Anticipated Funding (when you don’t know your chart string yet) OR Item Type (click the magnifying glass to search by chart string or item type description).
3. Stipend funding sources bring up a grid with 12 months. Tuition funding sources return 4 quarters. Enter the amounts per month/quarter as needed. Use “Populate all amounts” to fill the first box’s amount into all boxes.
4. If needed: change start/stop dates and/or amounts per month or term and/or add comments.
5. “Save Draft” if you would like to edit the award further before submitting; “Save and Submit” if you are ready to submit your award. Click “OK” on the next screen to return to the summary page.

Notes
- Funding is NOT feeding to FASIS at this time; after the Fall interface you will need to submit paperwork to FASIS if adding new stipend payments to a student. If the item type begins with “61”, please email tgs-fa@northwestern.edu with the student’s name and ID in the subject line to indicate that there has been a change so that TGS staff can process the appointment in FASIS.
- The student’s summary pages contain 5 tabs (Current Year, Previous Year, NU Customer Account, FA History by Aid Year and FA History by Term), bio-demo data, and three grids with Stipend, Tuition and Health/Activity awards.
- The Stipend grid will probably NOT have a number in the bottom-right box until January 2015.

Edit a single award

Choose “Award Entry/Download Student.” Search for a student.

Choose “Edit Award” from the left column of the relevant row on the summary page.
1. You may edit four areas: Funding source (item type / chart string), amounts, dates, comments.
2. 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.”
3. Click “OK” on the next screen to return to the summary page.

Notes
- During the remainder of 13/14 aid year (while External Awards is still in use) if an award’s Status is “External Awards” choosing “Edit award” will bring you to the External Awards pages.
- A status of “Manual Award” indicates that TGS Financial Aid entered the award. Contact tgs-fa@northwestern.edu if you need to modify something with a status of “Manual Award.”

Cancel a single award

Choose “Search/download by Student.” Search for a student by entering EmplID or name.

Choose “Cancel Award” from the left column of the relevant row on the summary page.
1. In the student’s summary page, click “Cancel award” in the far left column of the row you wish to edit.
2 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.
- Funding/awards entered through External Awards or Manual Award entry may NOT be cancelled using the Smart pages.

Add awards in bulk

Choose “Add New Award – Bulk.”
1 Select aid year, select funding by item type or chart string, enter amounts. Change dates and add comments if desired.
2 Add students in two ways:
   a. Upload a list of EmplIDs (click the arrow; type or paste a list of EmplIDs – one per row). EmplIDs added here overwrite any added below.

   ![Upload list of Empl IDs]

   b. Type/search for EmplIDs, hit “Tab” or “Enter” on keyboard. Click “+” at right to add a new row.

   ![Empl ID:]

3 The information at the top 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).
4 “Save Draft” or “Save and Submit.”

Note
- At the current time only new awards may be added in bulk; it is not possible to edit or cancel awards in bulk.