



ScholarTrack

“Quick Guide” for College Users

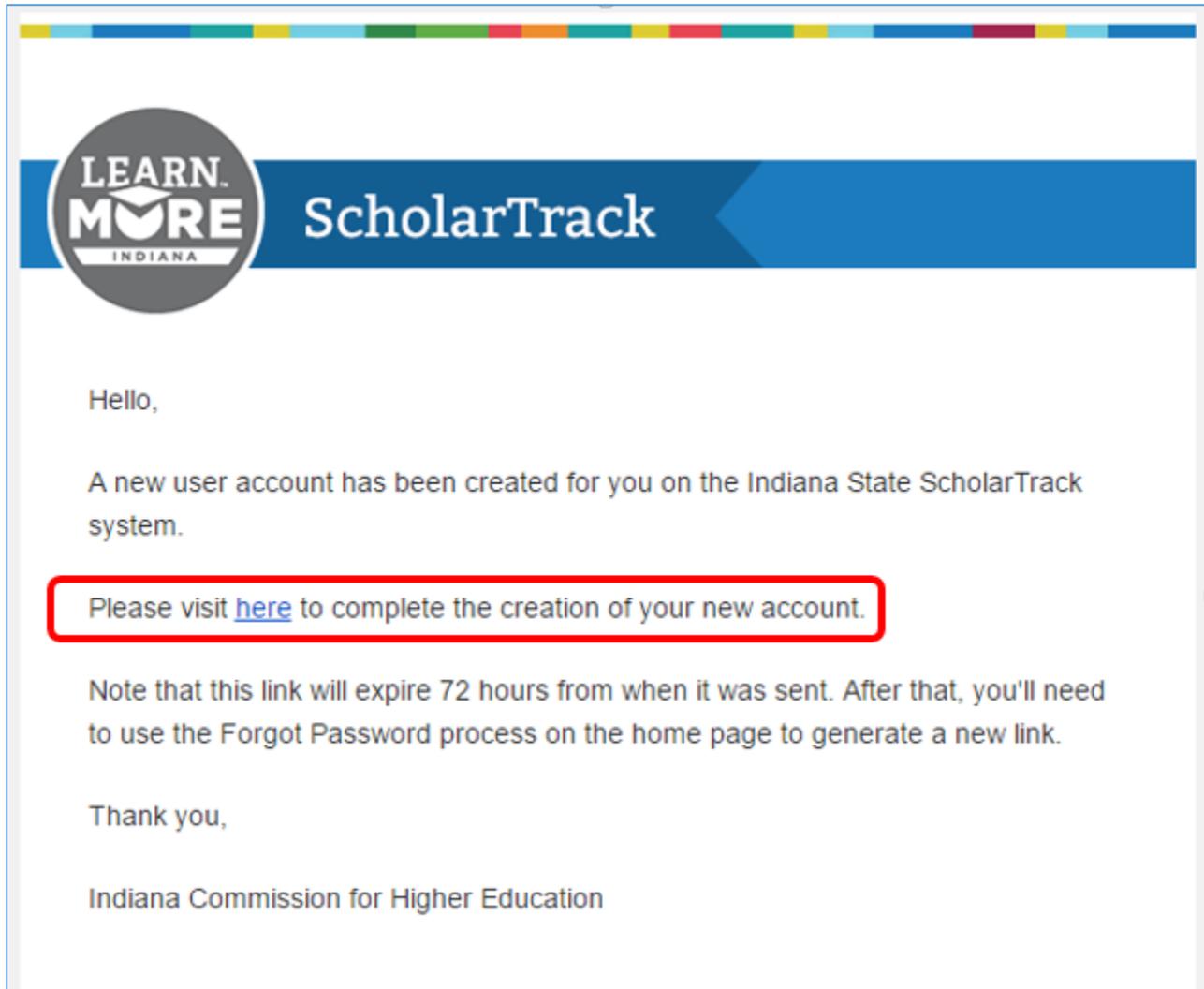
Updated: 2/6/2017

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Account Creation and Setting Your Password

New users to ScholarTrack will receive an email once their ScholarTrack accounts are created. To complete account creation, click the link within the email to set a password.



If you do not have a ScholarTrack account or you believe your account permissions are not correct, please contact the College Admin user at your institution. By default, the College Admin user is the financial aid director at your institution.

If you are a financial aid director and you did not receive an account creation email, please contact the Commission at ScholarTrack@che.in.gov. Financial aid directors may also request additional College Admin users at their institutions.

Account Permissions

There are four types of user roles available to colleges in ScholarTrack:

- **College Admin:** User can search for students, view student details, report and view credit completion data, override certain edits, view/claim/refund all award offers, view/upload/download files, view invoices and student-level claim data associated with each invoice, and create and manage user accounts. This role is reserved for financial aid directors, but directors can assign College Admin permissions to one or more users by request.
- **College Financial Aid:** Comparable to users with access to both xGrads and eStudent. User can search for students, view student details, report and view credit completion data, override certain edits, view/claim/refund all award offers, view/upload/download files, and view invoices and student-level claim data associated with each invoice.
- **College Support:** Comparable to users with access to eStudent only. User can search for students, view student details, view credit completion data, override certain edits, view award offers/claims/refunds. User cannot claim or refund award offers, report credit completion data, or view/upload/download files.
- **College Accounting:** Can view invoices and student-level claim data associated with each invoice. Can also perform limited Student Search with ability to view award offers/claims/refunds.

In addition, each user role can be set to “Read-Only.”

Logging into ScholarTrack

To log into ScholarTrack, visit ScholarTrack.IN.gov. All users of ScholarTrack, including students and parents, will log into ScholarTrack using the same web address and same login page.

Your username is your email address. You set your password when you clicked the link in your account creation email. If you cannot remember your password or want to change your password, click the “Forgot Password?” link and ScholarTrack will send you an email with a link to reset your password.

Enter your email address and password

LEARN MORE INDIANA ScholarTrack

Login

Login ID (Email Address or Scholar ID)
cshanksscholartrack+BSUcollegeadmin@gmail.com
[Change your Login ID \(Students only\)?](#)

Password

[Forgot Password?](#)

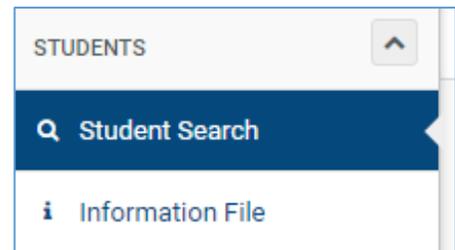
LOGIN

Student Search

After logging into ScholarTrack, all users are taken to the “Student Search” page. If you navigate away from this page, you can always return to the “Student Search” page under the “Students” section of the navigation bar on the left side of your screen.

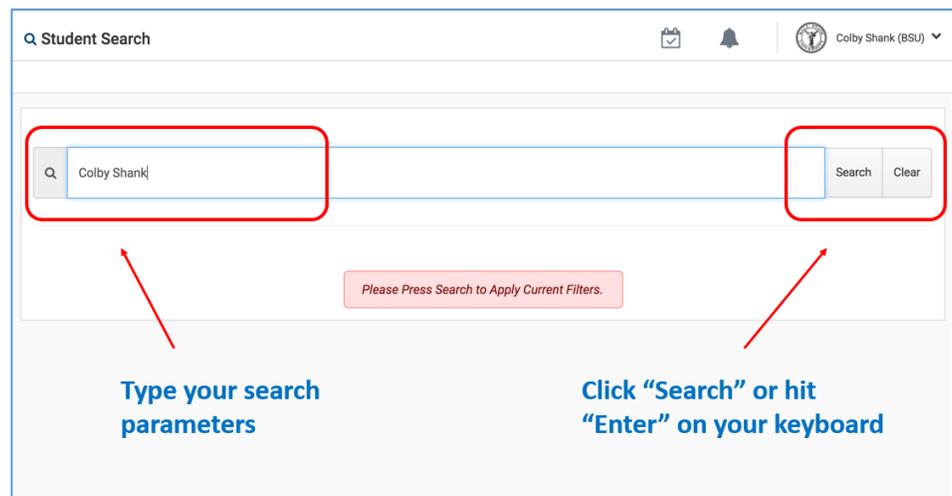
Searching is flexible in ScholarTrack. To search for a student, type in any combination of:

- First Name
- Last Name
- Full Social Security Number (either ###-##-#### or ##### format)
- Last Four Digits of SSN
- Date of Birth (MM/DD/YYYY format)
- Email Address
- Phone Number (either ###-###-#### or ##### format)

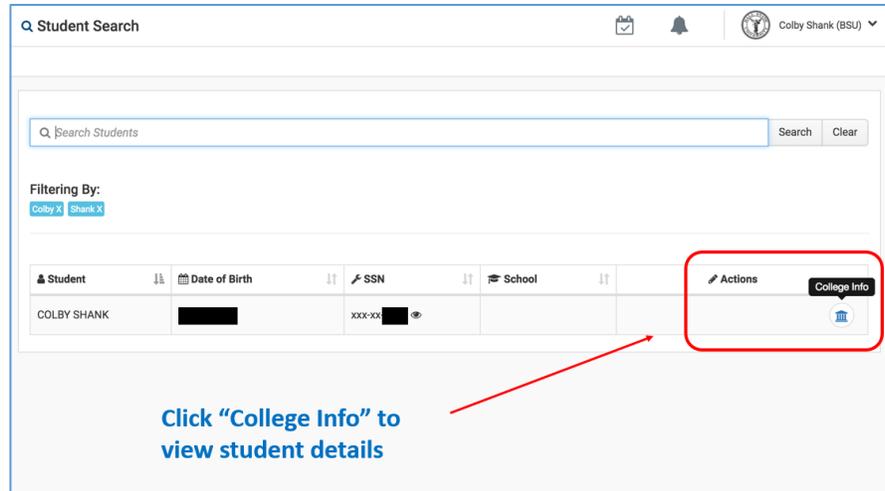


After entering your search parameters, hit “Enter” on your keyboard or click the “Search” button to the right of the search box.

If your search was too broad – meaning your search parameters returned more 50 results – try refining your search further by entering additional parameters. You can clear your search parameters by clicking the “Clear” button next to the “Search” button to the right of the search box.

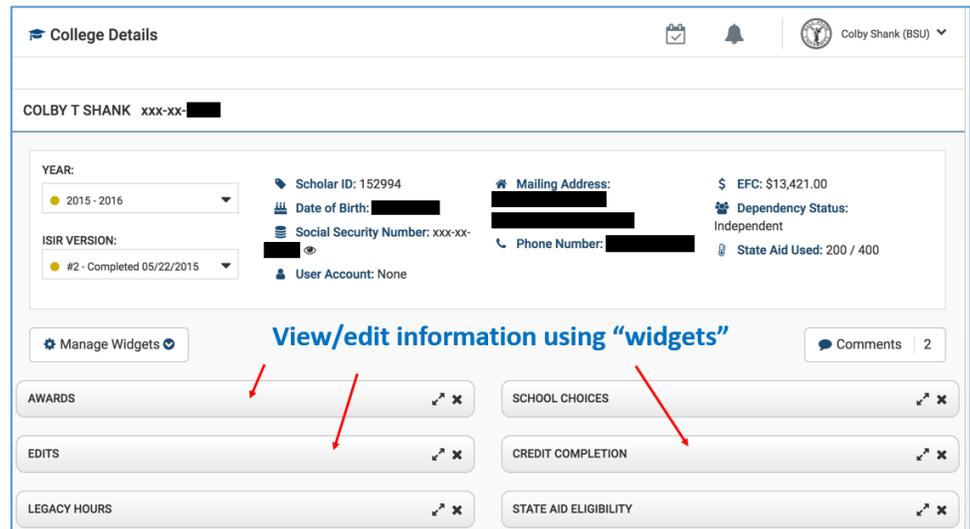


Once you find the student you were searching for, click the “College Info” button to view the “Student Details” page.

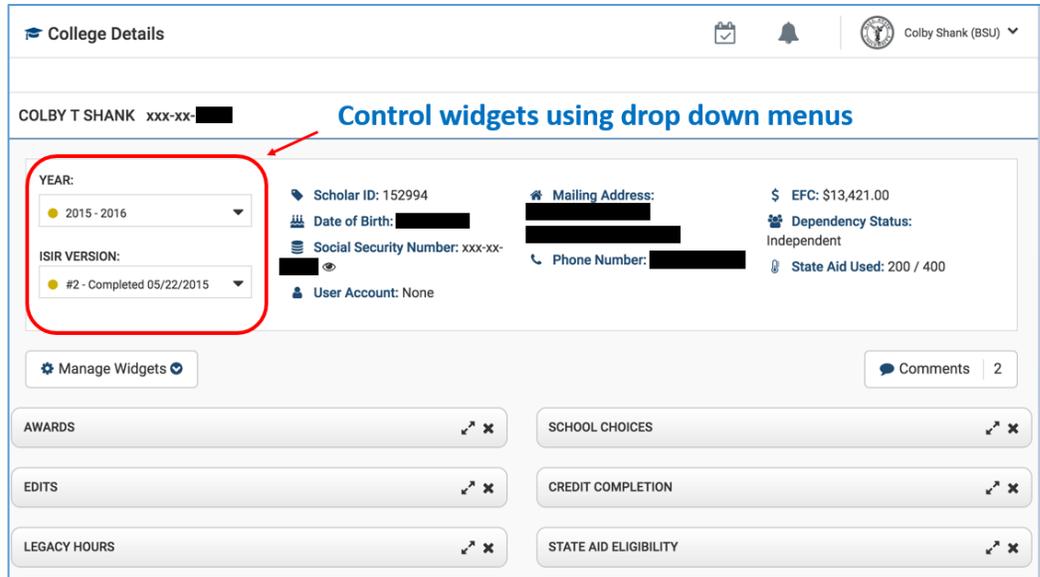


Student Details

The “Student Details” page is where users can view information for an individual student. The top of the “Student Details” page contains a header with identifying student information as well as critical pieces of information used to create award offers. Below the header are a series of “widgets.” These widgets allow you to view more detailed information and perform certain functions on the student in ScholarTrack.

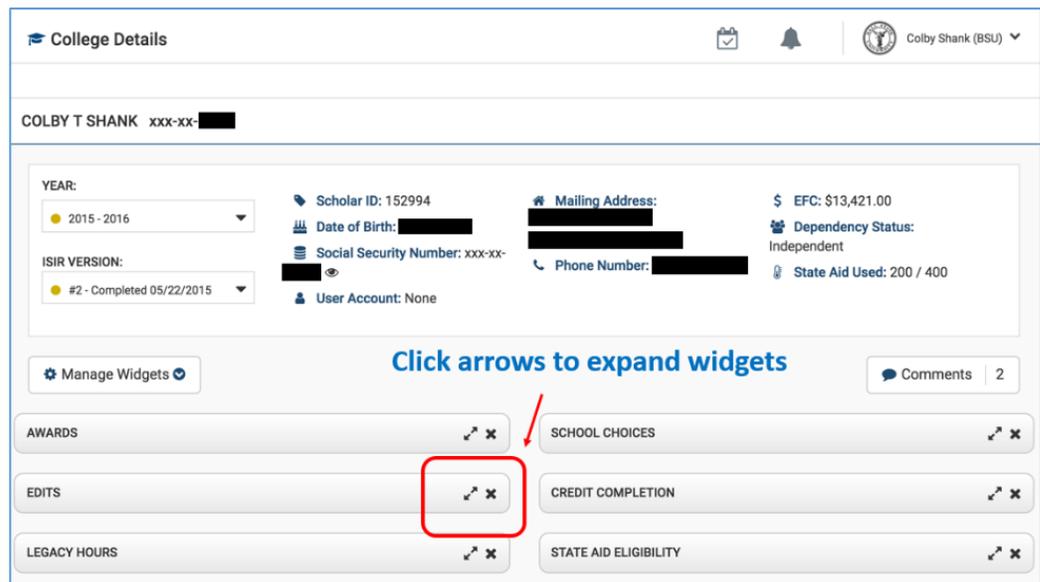


Also at the top of the “Student Details” page are “Year” and “ISIR Version” drop-down menus. These menus control the type of information displayed by several of the widgets. For example, the “Awards” widget will only display award offers for the award year selected in the “Year” drop-down menu.



Two additional features are located between the header and the widgets on the “Student Details” page.

The “Manage Widgets” button allows users to customize the type of information displayed on the “Student Details” page by choosing which widgets are visible.



ScholarTrack remembers which widgets to display each time a user logs in.

Any user can leave “Comments” on a “Student Details” page for a specific student. These comments are visible to all ScholarTrack users who can view the “Student Details” page for a given student. Students and parents cannot directly view these comments in ScholarTrack.

By default, widgets are collapsed on the “Student Details” page. To expand a widget to view its information, click the arrows. To remove a widget from the “Student Details” page, click the “x.” Don’t worry if you accidentally remove a widget from the “Student Details” page – you can always add the widget again by clicking the “Manage Widgets” button.

“Awards” Widget

The “Awards” widget display all current and former award offers at your institution, including award offers previously considered “Billed Awards” in xGrads.

In ScholarTrack, award offers are calculated and communicated to each eligible Indiana institution on the FAFSA. No longer are award offers created at just the first college choice.

AWARDS	
Evan Bayh Twenty First Century Scholars Program \$	
Application Submitted	07/01/2016
Application Status	Applied
Award Status	Ready To Claim
Award Start Date	07/01/2016
Award Expiration Date	06/30/2017
Amount Offered	\$8,746
Amount Claimed by Your Institution	\$0
Amount Claimed by Other Institutions	\$0
Remaining Balance	\$8,746
Percentage Used	0%
Adult Student Grant \$	
Application Submitted	08/18/2016
Application Status	Applied
Award Status	Ready To Claim

In addition to award offers, users can view the status of award applications using the “Awards” widget. As soon as a student submits an application in ScholarTrack, this application information is visible in the “Awards” widget.

To view claims and refunds on an award offer, click the “Claims” button denoted by the green dollar sign.

The “Claims” window appears. This window will display all claims and refunds made on a particular award offer. In addition to viewing claims and refunds, College Financial Aid and College Admin users can click the “Add New” button to add a new claim in ScholarTrack.

Claims				
Submitted	School	\$ Amount	Status	Actions
No claims have been filed				
Total		\$0.00		
+ Add New				

To make a new claim, users must specify the school, the school year (or academic year), the calendar, and the term. Except for historical billed award claims, most institutions will have only one calendar named "Standard." Users must also provide the amount of the claim and indicate if the student is in the final term of his or her degree program. Users may also provide a value in the optional "School Use Field" to tie

claims back to software systems at their institutions. Claims for some award types may require additional information. For example, claims on National Guard Supplemental Grant award offers will require indicating if the student is enrolled part-time or full-time. Claims on CVO award offers will require the number of credit hours.

After submitting a claim, the claim is immediately visible in ScholarTrack. Any user can view which user submitted the claim, when the claim was submitted, for which term, and the amount. In addition, each claim has a

Submitted	School	Amount	Status	Actions
Colby Shank 2/6/17 11:13 AM	Indiana State University Term 2 (Standard): 1/17/2017 - 5/12/2017	\$4,238.00	Pending	
Total		\$4,238.00		

status. All claims and refunds will begin in a "Pending" status. This status means that the Commission has not assigned this claim or refund to an invoice while processing payments. Once the Commission processes payments and assigns the claim or refund to an invoice, the status will change to "Processed." Once that invoice is paid by the Commission, the status will change to "Paid."

Once a claim is made in ScholarTrack, a partial or full refund of the claim can be made at any time. Click the "Refund" button denoted by a red arrow to initiate a refund.

Refunds require a dollar amount. Users may also assigned a value to the optional "School Use Field." Refunds for CVO award offers also require the number of credit hours.

Claims ✕

Submitted	School	\$ Amount	Status	Actions
Colby Shank 2/6/17 11:13 AM	Indiana State University Term 2 (Standard): 1/17/2017 - 5/12/2017	\$4,238.00	Pending	
Total		\$4,238.00		

Amount

School Use Field

Cancel
Save

Once submitted, refunds will immediately appear in ScholarTrack and restore funds to a student's award offer.

Claims ✕

Submitted	School	\$ Amount	Status	Actions
Colby Shank 2/6/17 11:13 AM	Indiana State University Term 2 (Standard): 1/17/2017 - 5/12/2017	\$4,238.00	Pending	✎ ↻
Colby Shank 2/6/17 11:15 AM	Indiana State University Term 2 (Standard): 1/17/2017 - 5/12/2017	(\$200.00)	Pending	✎
Total		\$4,038.00		

+ Add New

“Edits” Widget

The “Edits” widget allows institutions to view FAFSA issues that may impact the creation or claiming of state financial aid award offers. In addition, users can override certain edits in ScholarTrack using the “Edits” widget. The “Override” button is visible on certain edits that can be overridden in ScholarTrack.

EDITS	
FAFSA filed after March 10th deadline (01)	
Transaction Receipt Date	11/7/2016 - #4
Date Created	11/7/16 12:00 AM
Default on federal student loan and/or overpayment of federal grant (17)	
Transaction Receipt Date	11/7/2016 - #4
Date Created	11/7/16 12:00 AM
21st Century Scholar failure to fulfill matriculation requirement (24)	
Transaction Receipt Date	11/7/2016 - #4
Date Created	11/7/16 12:00 AM

After clicking the “Override” button, ScholarTrack will confirm that the user intended to override the edit on this student.

STATE AID ELIGIBILITY

Are you sure that you want to override this edit on this student for the remainder of the award year?

No Yes

Receipt Date 5/22/2015 - #2

Once the edit is overridden, the “Edits” widget will immediately update and indicate the edit is now cleared.

When an edit is overridden, ScholarTrack will place the student in a queue to recalculate the award offer.

The screenshot shows a window titled "EDITS" with three sections of edit information:

- FAFSA filed after March 10th deadline (01)**
 - Transaction Receipt Date: 11/7/2016 - #4
 - Date Created: 11/7/16 12:00 AM
- Default on federal student loan and/or overpayment of federal grant (17)** (highlighted with a red box)
 - Date Overridden: 2/6/17 11:46 AM
 - Overridden By: Colby Shank
 - Transaction Receipt Date: 11/7/2016 - #4
 - Date Created: 11/7/16 12:00 AM
- 21st Century Scholar failure to fulfill matriculation requirement (24)**
 - Transaction Receipt Date: 11/7/2016 - #4
 - Date Created: 11/7/16 12:00 AM

However, users can immediately recalculate an award offer by navigating to the “Awards” widget and clicking the “Recalculate” button at the bottom of the widget.

The screenshot shows the "Frank O'Bannon Grant" widget with the following details:

- Award Status: No Award Offered
- Status: Edits Present
- Status: Not in Need

A red box highlights a circular refresh icon (a green circle with a white refresh symbol) located at the bottom right of the widget.

The screenshot shows the "Recalculate Awards" dialog box with the following elements:

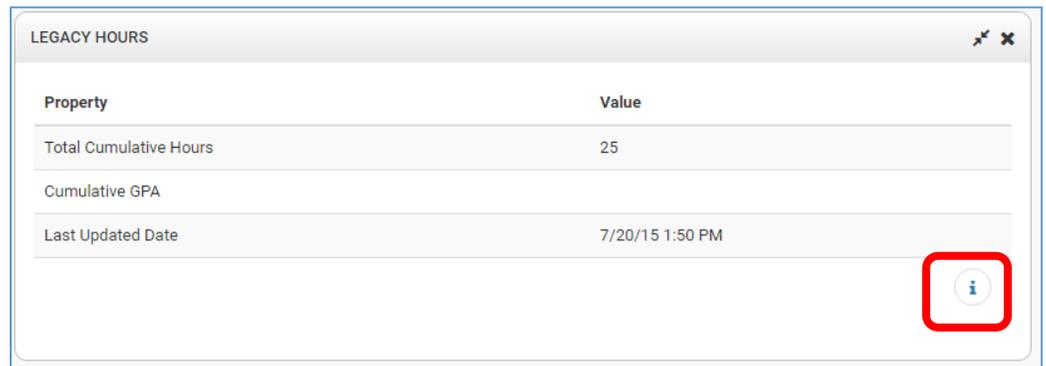
- Edits (with a dropdown arrow)
- Awards (with a dropdown arrow)
- Cancel button
- Start button (highlighted with a red box)

“Legacy Hours” Widget (Cumulative Credit Completion Data)

Users can view a summary of the credit completion data used to calculate 2014-2016 award offers for renewing students under the “Legacy Hours” widget.

In an effort to distinguish between the data used for the 30/60/90 cumulative credit completion requirement and the 30 per year credit completion requirement, cumulative credit completion data is known as “Legacy Credit Completion” data in ScholarTrack. Credit completion data reported by institutions term by term in ScholarTrack beginning with the 2016-2017 academic year is known as “Credit Completion” data.

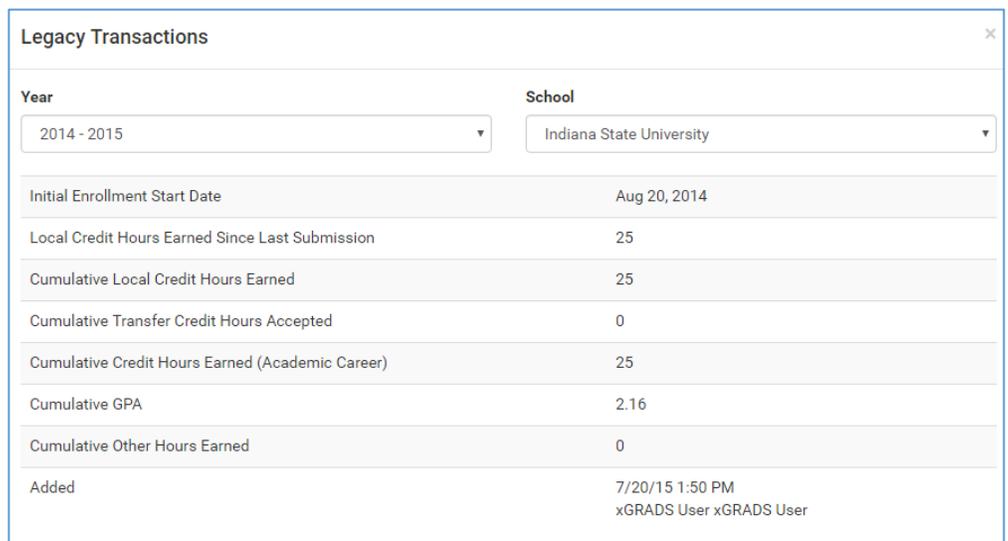
To view the underlying transactions, click the “View Transactions” button.



Property	Value
Total Cumulative Hours	25
Cumulative GPA	
Last Updated Date	7/20/15 1:50 PM

The “Legacy Transactions” window will appear that will display each credit completion transaction submitted in ScholarTrack.

While most institutions are finished with reporting “Legacy Credit Completion” data, some institutions may still need to report credit completion data to create 2016 award offers for “spring starters.” The Commission can open up credit completion reporting for your institution, allowing institutions to report new “Legacy Credit Completion” transactions.



Year	School
2014 - 2015	Indiana State University
Initial Enrollment Start Date	Aug 20, 2014
Local Credit Hours Earned Since Last Submission	25
Cumulative Local Credit Hours Earned	25
Cumulative Transfer Credit Hours Accepted	0
Cumulative Credit Hours Earned (Academic Career)	25
Cumulative GPA	2.16
Cumulative Other Hours Earned	0
Added	7/20/15 1:50 PM xGRADS User xGRADS User

Please send a request to CollegeFA@che.in.gov if you need to report additional credit completion data or need to make any corrections.