



## Scholarship Confirmation Report Process

Once Scholarship Administrators have completed encumbering/selecting students in KSN, administrators will need to download the “Scholarship Confirmation Report” located under the “Encumbered Funds” report and submit it to the Office of Student Financial Assistance.

Contact Tricia Baumgartner ([patricia@ksu.edu](mailto:patricia@ksu.edu)) or Rebecca Bishop ([rbishop@ksu.edu](mailto:rbishop@ksu.edu)) or others who are tasked such responsibility at the SFA office if you do not have access to upload the scholarship confirmation report to KSIS or need assistance uploading.

**PLEASE READ THESE INSTRUCTIONS COMPLETELY BEFORE STARTING THIS PROCESS.**

KSN column names	KSIS columns layout provided by SFA
Award Period: Fall 19/Spring 20	Aid Year: 2020
Scholarship Award Code	Award Code
Student EMPID	EmplID (000#)
Last Name	Last Name
First Name	First Name
Fund Code	Funding Source
Portfolio Name	Sch Name
Amount	Fall Amount
	Spring Amount
	Summer Must be on separate row than fall/spring
	Comments (50 Characters or less)

**Step 1:** Navigate to the “Encumbered Funds” report in KSN by following the instructions below

1-Click on the “Opportunity” tab.

2-Click on the “Portfolios” tab.

3-Click “Encumbered Funds”.

4-Hover over the “Complete View”.

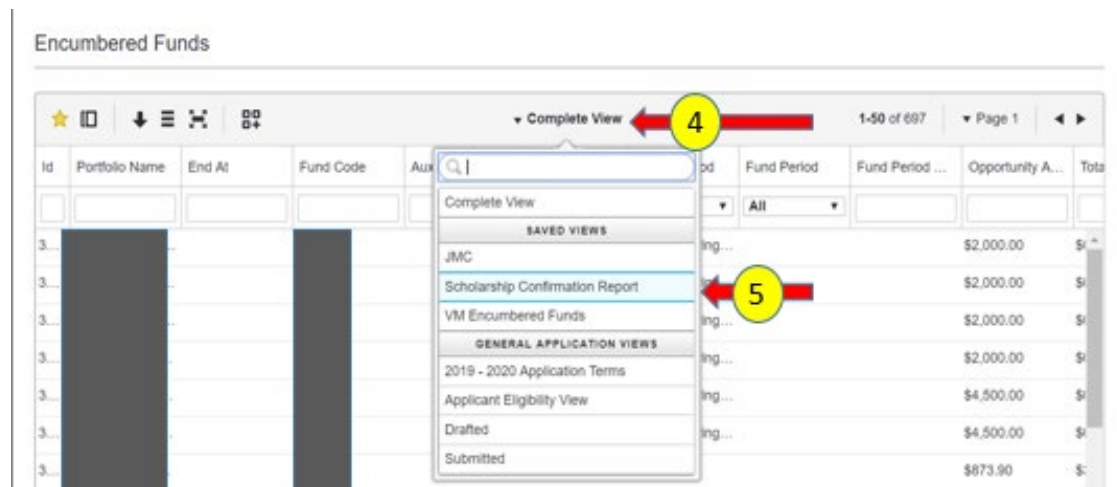
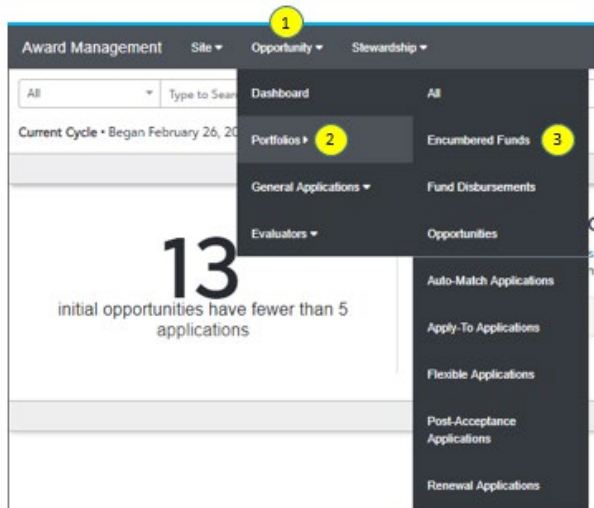
5-Click on **Scholarship Confirmation Report (Fall 2021/Spring 2022)** – only use this grid if you are encumbering for the 2021-2022 academic year.

6-Make sure that the “Category” columns are all showing “Accepted” or “Pre-Accepted (Incoming Students)”. If any of the categories aren’t set to “Accepted” or “Pre-Accepted (Incoming Students)”, you will need to review and ensure they are in the “Accepted” or “Pre-Accepted (Incoming Students)” categories.

7-Click the down arrow  to download your report.

**Note:** You will either receive an email from the system when your report is ready, **or** an on-screen flash message will appear to alert you when your report is ready.

- When a new report is being generated, a process automatically starts in the background to run the report. Depending on the number of records in your grid, the report may take a few moments to generate. Please note that you will need to refresh your page to get the report.
- Once completed, a new on-screen flash message will appear to alert you and you will also receive a system generated email.
- To open the report, click on the link in the on-screen flash message.
- You will then be prompted to open/save your file and then you can view the results in Excel. Alternatively, administrators may check their email for an email also containing a link to download the file.



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Scholarship Confirmation Report 1-50 of 697 Page 1

Category	Categorized At	Scopes	Amount	Award Period	Scholarship A...	Student EMPID	Last Name	First Name	Fund
Accepted	12/10/2018	All	\$2,000.00	Fall 18 / Spring...					
Accepted	12/04/2018		\$2,000.00	Fall 18 / Spring...					
Accepted	12/04/2018		\$2,000.00	Fall 18 / Spring...					
Accepted	12/04/2018		\$2,000.00	Fall 18 / Spring...					
Accepted	10/01/2018		\$2,250.00	Fall 18 / Spring...					
Accepted	10/01/2018		\$2,250.00	Fall 18 / Spring... Leadership					
Accepted	09/21/2018		\$870.00	Fall 18					
Accepted	09/21/2018		\$2,000.00	Fall 18 / Spring... Activity					

**Step 2:** Follow the instructions below once you have downloaded your KSN report

If this is your first time to work on this process, you will need to download the KSN template from the KSU Foundation website. Save a copy to your own directory as a master. You can then use this over and over in the future.

The template can be accessed at [https://ksufoundation.org/financials/accounting\\_forms.html](https://ksufoundation.org/financials/accounting_forms.html)

**Tip:** If you are awarding for the 2021-2022 academic year, you will need to use the template called “KSN-KSIS Template AcadYr beg 2021(confirmatiion form)”.

Open the Mater KSN-KSIS Template and save with a new name. For example: KSN-KSIS-CSS

1-Copy and paste the cell “A2 through K2” from the KSN report downloaded and paste it into cell “A2 through K2” of the appropriate KSN-KSIS template. Do not copy the column headers.

The pre-set formula in the KSN-KSIS template will automatically split the “Fall, Spring and Summer Amounts”. Drag the columns containing the formula down (L, M, N) as you see fit.

2-Select the “EmplID” column and right click Format cell > click custom > change “Type” from “General” and input 00000000 > click Ok. This adds the leading three zeros to the EmplID.

3-Highlight all cells in Column L, M and N > RIGHT CLICK and COPY > then RIGHT CLICK and select PASTE SPECIAL VALUES.

4-Sort by Categorized at “Oldest to Newest”.

5-Delete any rows that represent awards that have been previously sent to KSIS. For example, if you send files weekly, delete all awards with a date prior to the last file saved.

6-Delete column A, B, C and D.

### Step 3:

1-Adjust the “Aid year” column. Example, you will adjust Fall 20 / Spring 21 to 2021

2-The “Award code” column should be blank unless you are funding a university scholarship. Only complete the abbreviation on the “Award Code” column if you are funding a Putnam or the Distinguished University Scholar (which show up on the report as “Distinguis”). The award code must be 2 characters (i.e., Putnam “PU” or “PN”, Distinguished University Scholar “DS”). **Any other award code in the column should be deleted unless it’s a Putnam or a Distinguished University Scholar.**

3-Sort your file by Award Code

- Delete data in Cell B other than Putnam or Distinguished University Scholar
- Change Distinguis to DS in all pertinent rows
- Change Putnam to PU in all pertinent rows
- Change Putnam NM to PN

The screenshot shows an Excel spreadsheet titled "KSN-KSIS Template-Acad Yr beg-2019 - Copy - Excel". The spreadsheet has columns A through Q. The data is organized into rows, with columns A through K containing individual award details and columns L through N containing summary amounts. Annotations with numbered circles (1-6) point to specific cells and formulas:

- 1: Points to the "Aid year" column (E), with a text box: "Adjust the 'Aid year'. For example: adjust Fall 19/Spring 20 to 2020".
- 2: Points to the "Award Code" column (F), with a text box: "The 'Award Code' column should be blank unless it's Putnam or University Distinguished scholar".
- 3: Points to the "Fall Amount" column (L), with a text box: "The pre-set formula automatically split the 'Fall Amount'".
- 4: Points to the "Spring Amount" column (M), with a text box: "The pre-set formula automatically split the 'Spring Amount'".
- 5: Points to the "Summer Amount" column (N), with a text box: "The pre-set formula recognized that there aren't any summer awards therefore a '0' is displayed".
- 6: Points to the total amount in column D (row 15), with a text box: "To make sure everything balances, we added the amounts total in column 'D' and compared it to the amount total in column 'L and N'".

Category	Categorized At	Scopes	Amount	Aid year	Award Code	EmplID (000#)	Last Name	First Name	Fundline Source	Sch Name	Fall Amount	Spring Amount	**Summer Mus	Comments (50 Characters or less)
Accepted	8/27/2018	College of	\$1,000.00	Fall 19 / Spring 20	Memorial		Laura	Laura			500	500	0	
Accepted	8/27/2018	College of	\$1,500.00	Fall 19 / Spring 20	Foundation		Laura	Laura			750	750	0	
Accepted	8/27/2018	College of	\$8,000.00	Fall 19 / Spring 20			Taybor	Taybor			4000	4000	0	
Accepted	8/27/2018	College of	\$1,000.00	Fall 19 / Spring 20	Achievemen		Sydney	Sydney			500	500	0	
Accepted	8/27/2018	College of	\$2,000.00	Fall 19 / Spring 20	Putnam		Gerit	Gerit			1000	1000	0	
Accepted	8/27/2018	College of	\$850.00	Fall 19 / Spring 20	Activity		Eryn	Eryn			425	425	0	
Accepted	8/27/2018	College of	\$2,000.00	Fall 19 / Spring 20	Achievemen		Hanna	Hanna			1000	1000	0	
Accepted	8/27/2018	College of	\$575.00	Fall 19 / Spring 20	Achievemen		Kassady	Kassady			287.5	287.5	0	
Accepted	8/27/2018	College of	\$750.00	Fall 19	Putnam		Paige	Paige			750	0	0	
Accepted	8/27/2018	College of	\$2,000.00	Fall 19 / Spring 20			Jordan	Jordan			1000	1000	0	
Accepted	8/27/2018	College of	\$1,000.00	Fall 19 / Spring 20			Chelsea	Chelsea			500	500	0	
Accepted	8/27/2018	College of	\$1,480.00	Spring 20	Foundation		Taylor	Taylor			0	1480	0	
			\$22,155.00								10712.5	11442.5		

### Step 4:

1-Save your file to a “CSV comma delimited” (example: Encumbered funds 3-22-21 to 3-24-21)

**Important Note:** When saving your file, include the date range from your last downloaded report to assist you with keeping track of when your last report was downloaded.

2-Upload your file to KSIS.

**Note:** Please reach out to the Tricia Baumgartner or Rebecca Bishop at SFA if you are not sure how to upload your file to KSIS.