

Award System User Guide for Schools

**Login to the
Louisiana Award System**

Please choose your logon type and then enter your user ID and password to continue

 Student Login	User ID <input type="text"/>
	Password <input type="password"/>
 College Login	<input type="button" value="College Login"/>

Note: Please contact your password coordinator with any sign-on or access issues.

This LOSFA system is for authorized users only.

Use of this system without authority, or in excess of granted authority, is illegal and will be treated as such. Such use may result in civil fines, termination of employment, criminal charges, or other legal penalties. Usage of this site is audited and monitored. All persons are hereby notified that the use of this system constitutes consent to such monitoring and auditing.

This guide will cover:

1. [Logging In](#)
2. [Passwords](#)
3. [The Welcome Screen](#)
4. [A Summary of the Function Tabs](#)
5. [Navigating the Award System](#)
6. [User Accounts:](#)
 - o [Administrator Accounts](#)
 - o [Standard Accounts](#)
7. How To...
 - o [Work with User Accounts](#)
 - o [Look up a Student](#)
 - o [Submit a Payment Request or Grade](#)
 - o [Download a Roster](#)
 - o [Upload a File](#)

Appendix A. [Questions & Answers](#)

Notice:

No manual or guidebook can cover every possible scenario, but this document covers most common functions.

Images in this document may differ somewhat from those on your screen, depending on the release date.

This document is intended for school users, but not all sections apply to every user. [Part 6, User Accounts](#), is intended for those with Administrator accounts, as is the [“How to Work with Accounts”](#) section of Part 7, How To...

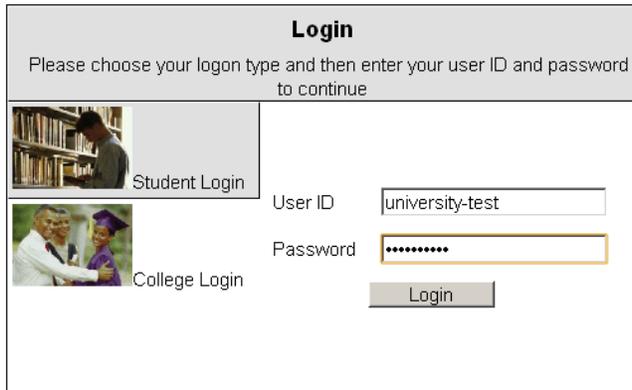
Updates to this Document:

Effective Date	Sections Affected	Summary of Changes
8/1/2010	N/A	N/A - this is the first version
9/4/2012	All	General updates applied to all sections
10/17/2012	7. How to Upload a File	PP 45-48: updated images to reflect button differences; inserted text box about PRN extension

1. Logging In

The Award System is accessed through the main website. The URL is linked on several pages throughout the site, but the direct URL is <https://www.osfa.la.gov/AwardSystem>.

After the page loads, click **College Login** to start. Next, enter your User ID and Password*, then click the **Login** button:



Login

Please choose your logon type and then enter your user ID and password to continue

Student Login

College Login

User ID

Password

Login

**If you have an Administrator account, the User ID and Password is in a letter which is usually sent to the Financial Aid Director of each campus. Other user accounts will have User IDs and Passwords assigned to them by an Administrator account holder. For more information, see [Part 6, User Accounts](#).*

A successful login will take you to the Welcome Screen unless this is the first time the account has been used. In that case, you will be prompted to change the initial password to one of your own. Passwords are covered next in Part 2, **Passwords**.

2. Passwords

For your first visit to the Award System, you will be asked to change your password* from the one initially assigned to your account to one of your own choice, as shown below:

Reset Password

You password has expired and must be changed to proceed.

Login Name

* Old Password

* New Password

* Confirm New Password

* Indicates a required field

Enter the default password in **Old Password** and enter your new password in the two fields beneath, then click the **Accept** button. Successfully changing your password will take you the welcome screen; otherwise you will be prompted to try again. Your password must be at least eight characters long, and must contain at least one character from three of the four types shown below:

1. Upper case letters
2. Lower case letters
3. Digits
4. Special characters

Furthermore, your password cannot be your first or last name, and for users who have logged in before, the new password cannot match the last three passwords that were used.

Passwords that meet the minimum requirements will expire after thirty days; however, the more complex your password is, the longer your expiration period will be.

** The password rules are taken from "IT_STD_1-01 Passwords" under Office of Information Technology's Enterprise Policies and Standards.*

3. The Welcome Screen

A successful login to the Award System will take you to a Welcome Screen—also called the **Home** tab—like the one shown below. This screen is your link to the all the Function Tabs assigned to your ID*. These tabs are arranged in a row across the top of your screen. This screen is also where we will post announcements, such as approaching deadlines or scheduled web maintenance. Such messages will appear beneath your school name.

The screenshot shows the Welcome Screen interface. At the top, there is a navigation bar with tabs: Home, Students, Academics, Payments, LEAP, Reports, User Accounts, and Upload Files. Below the tabs, the user is greeted: "Welcome back **Financial Aid Director**. Your last visit was 8/4/2010 10:56:58 AM." The school name is listed as "UNIVERSITY OF LA-MONROE". A blue banner titled "Broadcast Messages" contains a message dated 8/4/2010: "This is a test. broadcast messages would announce such things as scheduled maintenance or upcoming program deadlines." At the bottom of the screen, there are two links: "Account Options" and "Log Out".

* Note that different users may see different functions—your school's participation and your authority level determine what you can or cannot see.

Next is **Account Options**, at the bottom of your screen. This is where you will maintain your account. Clicking the **Account Options** link will open a screen like this one:

The screenshot shows the "User Account" and "Password" management interface. The "User Account" section displays the following information: Login Name: university-test; Account Created: August 3, 2010; Last Login: August 4, 2010 10:56 AM. The User Name is split into "Financial Aid" (First) and "Director" (Last). The Email Address is "test@test.edu". There are "Update" and "Close" buttons. The "Password" section shows three input fields for "Current Password", "New Password", and "Confirm Password". The password expires on "October 12, 2010 11:31 AM". There are "Update" and "Close" buttons. The "Requirements" section lists the following rules: Passwords must be a MINIMUM of 8 characters long; Passwords must contain characters belonging to 3 of the following 4 classes: Upper case letters, Lower case letters, Digits, and Special characters; Passwords cannot match the last 3 passwords used; Passwords must not be either first or last name; Passwords meeting these requirements expire after 30 days; Longer passwords may be valid for a longer period of time.

4. A Summary of the Function Tabs

The Function Tabs at the top of the screen allow you to perform the tasks needed service your students with LOSFA administered awards: Submit Payment Requests or Grade Information, upload batch files and download Roster Information. More details will be provided in Part 7, **How To**, but this will serve as a quick introduction:

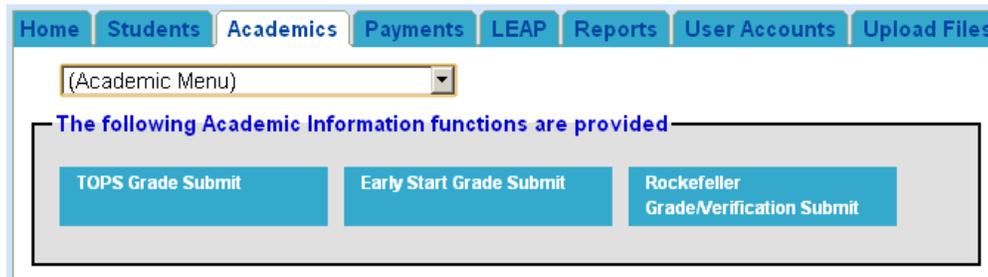


The first tab, **Home**, has been covered in previous pages, so we will start with the second tab, **Students**:



The **Students** tab has three functions: TOPS Student Eligibility, TOPS Grade Information and Student Awards (allows you to see what LOSFA administered awards the student has received).

The next tab is **Academics**, and this is where individual TOPS, Early Start, or Rockefeller grades are entered (*uploading data using a file is covered later*):



The fourth tab is **Payments**, and this is where all manual Payment Requests will be done (*again, uploading data using a file is covered later*):



Note that you may see different Payment functions based both on your role and the availability of the program associated with the function.

The fifth tab is **LEAP**, and it allows uploading of LEAP Applications and Student Rosters:



This tab will be removed on reporting for the 2011-2012 academic year is complete.

The sixth tab is **Reports**. This allows access to and downloading of reports and rosters for all LOSFA-administered financial aid programs:



While the specifics for each report or roster may vary, they all share common functions to the maximum extent possible. As new reports and enhancements are added, they will be included on the screen (see [“How to Download a Roster”](#) on page 37 for additional details).

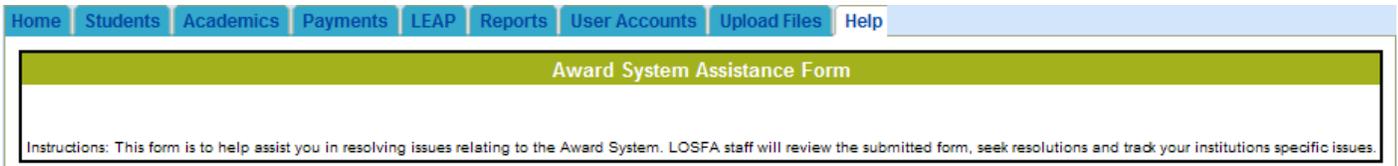
The seventh tab, **User Accounts**, is available only to administrator-level users (Part 6 goes into more detail).



The eighth tab is **Upload Files**, which allows uploading of the various files needed to administer programs and review your file upload history:



The ninth tab is **Help**, which allows access to the Award System Assistance Form for sending reports of problems and requests for help directly to LOSFA's TRACKIT! Work order system:

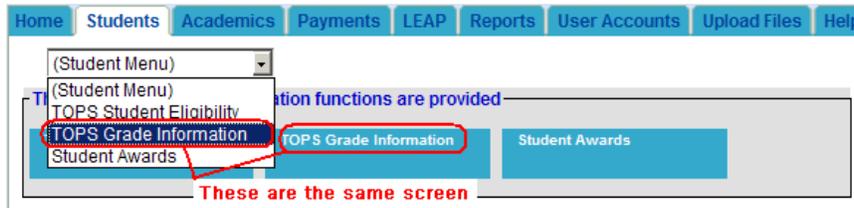


The screenshot shows a navigation menu at the top with tabs for Home, Students, Academics, Payments, LEAP, Reports, User Accounts, Upload Files, and Help. The Help tab is selected. Below the menu is a green header bar with the text "Award System Assistance Form". Underneath the header is a large white area containing the following instructions: "Instructions: This form is to help assist you in resolving issues relating to the Award System. LOSFA staff will review the submitted form, seek resolutions and track your institutions specific issues."

5. Navigating the Award System

The Award System has been designed around a simple framework that provides a common look and feel throughout its screens. While some functions may be more complex than others, most share some basic navigation tools: **Find**, **View**, **Edit**, **Delete**, and **Close**. Learn these tools on one screen and you should be able to navigate any of the other screens.

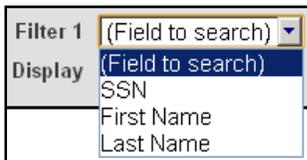
For ease of navigation, you can access functions in more than one way. Functions are listed in a drop-down menu and as buttons:



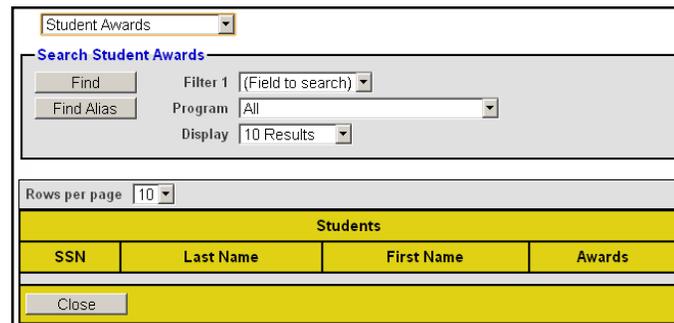
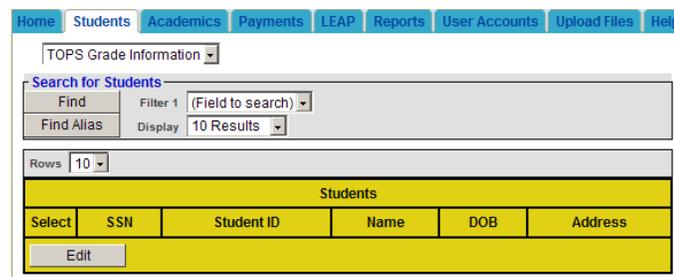
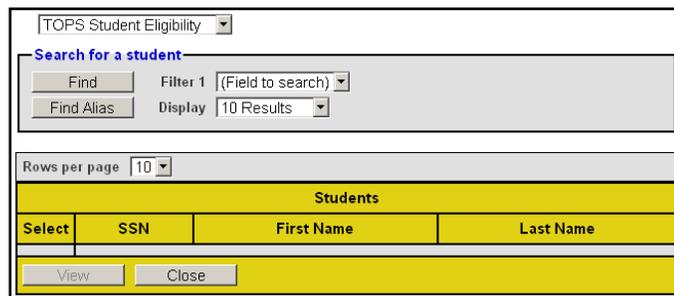
Using either one will take you to the same screen.

As mentioned above, sharing common design elements will make the screens easier to navigate. Note the three Student Menu functions—they all have the same look and feel. They operate similarly, too.

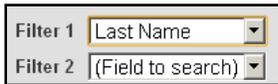
To demonstrate, we'll use the TOPS Student Eligibility screen as an example. Clicking the drop-down selector for **Filter 1** will show that you can search by SSN, first name, or last name.



Once you select a search filter, two things will change on your screen. First, a box will appear to the right of **Filter 1**—this is where you will enter your search value:



Second, another filter key will appear, giving you the option of further refining your search:



Filter 1 Last Name
Filter 2 (Field to search)

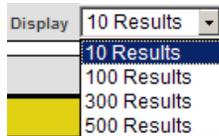
If you use this second filter key, you will gain the option of an additional filter key.



Filter 1 Last Name Presley
Filter 2 First Name Elvis
Filter 3 (Field to search)

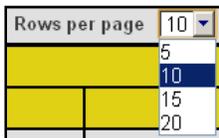
This will continue depending on how many keys are assigned to that Function.

After you have entered your search keys, you can click the **Find** button to start your search. However, there are two optional parameters you can set. First, you can specify how many records to return by setting the **Display** value. This is helpful if you're not looking for a specific person but instead are searching for a sample. If you do not make a selection, the **Display** value defaults to "10 Results," as shown here:



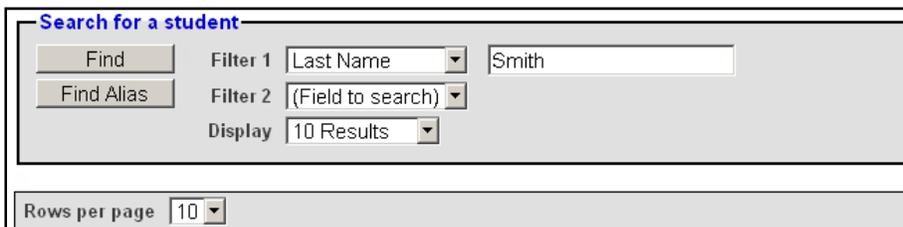
Display 10 Results
10 Results
100 Results
300 Results
500 Results

Second, you can also decide how many rows you want displayed at a time. This can be helpful if you have a smaller screen resolution or a slow connection—fewer rows means less screen space and less time to load. The default value for this setting is 10 rows per page:



Rows per page 10
5
10
15
20

To demonstrate the **Display** and **Rows per page** values, this sample search will return a large record set:



Search for a student
Find Filter 1 Last Name Smith
Find Alias Filter 2 (Field to search)
Display 10 Results
Rows per page 10

Note that only one filter is used, and that the other values are left at their defaults.

Clicking **Find** brings back only ten records:

Search for a student

Find Filter 1 Last Name [v] Smith []

Find Alias Filter 2 (Field to search) [v]

Display 10 Results [v]

Rows per page 10 [v]

Students - Only (10) results displayed. Please narrow your search request.

Select	SSN	First Name	Last Name
<input type="radio"/>	████████	J████████	SMITH
<input type="radio"/>	████████	S████████	SMITH
<input type="radio"/>	████████	J████████	SMITH
<input type="radio"/>	████████	C████████	SMITH
<input type="radio"/>	████████	C████████	SMITH
<input type="radio"/>	████████	J████████	SMITH
<input type="radio"/>	████████	K████████	SMITH
<input type="radio"/>	████████	M████████	SMITH
<input type="radio"/>	████████	M████████	SMITH
<input type="radio"/>	████████	L████████	SMITH

View Close

SSNs have been masked for security reasons

You can return up to 500 records. Once the data has been retrieved, the system will give you links to allow you to move forwards or backwards within the record set:

Display All Results [v] [Click here to move from page to page.](#)

Rows per page 10 [v] [Previous](#) 1-10 of 500 [v] [Next 10](#)

Changing Rows per page will affect how many records you see per screen. Here the value has been set to 20, and you can see that the navigational links have changed accordingly:

Rows per page 20 [v] [Previous](#) 1-20 of 500 [v] [Next 20](#)

Note that you can change any of the parameters any time you need. Simply edit the value or values and click **Find** again. To return to the Function menu for that tab, click the **Close** button.

Also note that the tabs will retain your search results as you move from tab to tab. This can be helpful if you need to compare values between different tabs. However, this is only effective during your session. If you log out or your session times out, you will have to log in again and your session will start over with all the defaults.

6. User Accounts

As mentioned earlier, each campus can have multiple accounts. This can be helpful for institutions that have personnel who are responsible for different duties. For example, one staffer might only be responsible for TOPS data while a second might only handle Early Start data. This can be accommodated in the Award System.

There are two types of accounts in the Award System: Administrator and Standard. All institutions will have at least one account and this will be an Administrator account.

An Administrator account is one which is set up by LOSFA for an institution. The User ID and Password are created by LOSFA and sent via mail to the institution's Financial Aid Director. Upon receipt of this letter, the Administrator account holder will enter this User ID and Password to activate the account. The system will then prompt the user to change the password. The Administrator account has the authority level to perform all school functions and also has the ability to create other accounts if needed.

A Standard account is one created by an Administrator account holder. Standard accounts are role-based therefore different accounts may perform different functions. The roles available to Standard accounts are shown below:

- College**
- College Chafee**
- College GO Grant**
- College Rockefeller**
- College TOPS**
- College TOPS Tech Early Start**
- College View Only**

These roles are based on LOSFA's programs, so a user who Rockefeller duties would need one with the **College Rockefeller** role.

Accounts can also have more than one role. For example, a user who performs TOPS and Rockefeller duties would be assigned **College TOPS** and **College Rockefeller**. However, users who perform *all* financial aid duties do not have to have each individual role assigned to them—instead, assign the **College** role to them. The **College** role is a general-purpose role that can access all Award System tabs and functions except for **User Accounts**.

The **College View Only** role does just what it implies—it gives a user limited search capabilities but does not allow the user to enter grades or payment requests.

See also [How to Work with User Accounts](#) in Part 7 and the [Q&A](#) section in Part 8 for more information on user accounts.

If you do not have an Administrator account, you can skip “How to Work with User Accounts” and go to “How to Look up a Student” on page 29.

7. How To...

This section of the User Guide will cover the basic tasks in the Award System—how to work with user accounts; how to look up a student; how to submit a payment request or grade; how to download a roster; and how to upload a file.

How to Work with User Accounts:

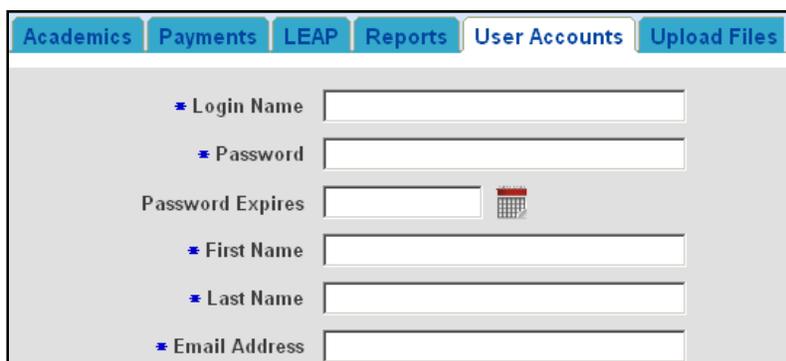
If you are an Administrator account holder for your campus, you have the authority level to create additional user accounts and assign roles to them. This can be helpful for larger institutions that have compartmentalized their staff—this way, a user can be granted access only to those programs for which he or she is responsible.

In this section you will how to create an account; how to search for an account; how to edit an account; how to add or delete roles; and how to terminate an account.

A: How to Create an Account—the first step to creating accounts is to sign in to the Award System and click the **User Accounts** tab:



That opens up the main account window, shown here. This is where you create an account; it is also where you search for accounts that you have made earlier.

A screenshot of the User Accounts form. The form is titled "User Accounts" and is part of a navigation menu that includes Academics, Payments, LEAP, Reports, User Accounts, and Upload Files. The form fields are: Login Name, Password, Password Expires (with a calendar icon), First Name, Last Name, and Email Address. Each field is preceded by a blue asterisk icon.

The full screen is shown on the next page, with a definition of each field.

#1, **Login Name**, is the User ID assigned to an account.

#2, **Password**, is the account Password. You can create it or you can use the password generator (which is on the second account screen, shown later).

#3, **Password Expires**, is a system field, and it will show you when a password change is required.

#4, **First Name**, is a user's first name.

#5, **Last Name**, is a user's last name.

#6, **Email Address**, is a user's email address.

#7, **Effective Date**, is the date that an account will go live. This is useful if you are creating an account for a user which will be transferring to your section at some future date. You can enter the value manually, in the MM/DD/YY format, or you can use the date picker (the tiny calendar icon to the right of the field). If you do not supply a value, the system will default the value to the current date.

#8, **Termination Date**, is the date that you turn off a user's access. If you have a user who is leaving your office, you can set the date to that user's last day. Like Effective Date, it is in MM/DD/YY format and it has a date picker.

#9, **Last Login**, is a system field which shows when a user last signed on to the Award System.

#10, **User Roles**, is where you indicate which tasks the user should perform. This will be demonstrated later.

#11, **Display Terminated Records**, works with #13, the Find button, to show closed user accounts. This will be demonstrated later.

#12, the **Clear** button, resets the data entry fields.

#13, the **Find** button, allows you to search for users at your institution. This will be demonstrated later.

#14, the **Add** button, creates the account based on your input. A demonstration starts on the next page.

The screenshot shows the 'User Accounts' form in the Award System. The form is titled 'User Accounts' and has a navigation bar at the top with tabs for 'Academics', 'Payments', 'LEAP', 'Reports', 'User Accounts', and 'Upload Files'. The form fields are numbered 1 through 14. Field 1 is 'Login Name', field 2 is 'Password', field 3 is 'Password Expires', field 4 is 'First Name', field 5 is 'Last Name', field 6 is 'Email Address', field 7 is 'Effective Date' with a date picker, field 8 is 'Termination Date' with a date picker, field 9 is 'Last Login', and field 10 is 'User Roles' with a dropdown menu. Field 11 is a checkbox for 'Display Terminated Records'. At the bottom are buttons for 'Clear' (12), 'Find' (13), and 'Add' (14).

When the User Account screen is loaded, the Add button is not active and is grayed out. Begin entering data your data. Note that **Login Name** is not case-sensitive but **Password** is. After entering **Email Address**, the **Add** button is no longer grayed out:

The screenshot shows a user account creation form. The fields are filled with the following information:

- ★ Login Name: tops user
- ★ Password: TestPassword99
- Password Expires: [empty]
- ★ First Name: John
- ★ Last Name: Smith
- ★ Email Address: jsmith@test.edu (highlighted with a red box)
- Effective Date: [empty]
- Termination Date: [empty]
- Last Login: [empty]
- User Roles: A list box containing: College, College Early Start, College GO Grant, College LEAP, College Rockefeller, College TOPS, College TOPS Tech Early Start, College View Only. The 'College TOPS' role is highlighted with a blue background.
- Display Terminated Records:

At the bottom, there are three buttons: Clear, Find, and Add. The Add button is highlighted with a red box. A red arrow points from the 'College TOPS' role in the list to the Add button. A red text box next to the arrow says: "Notice that the Add button is now active."

To add **User Roles**, scroll through the list and make your selection:

This is a close-up of the 'User Roles' list box. The list contains the following items: College, College Early Start, College GO Grant, College LEAP, College Rockefeller, College TOPS, College TOPS Tech Early Start, and College View Only. The 'College TOPS' item is highlighted with a blue background, indicating it is the selected role.

Note that you can assign more than one role by holding down the Ctrl key then clicking the roles.

This is a close-up of the 'User Roles' list box. The list contains the following items: College, College Early Start, College GO Grant, College LEAP, College Rockefeller, College TOPS, College TOPS Tech Early Start, and College View Only. The 'College TOPS' and 'College TOPS Tech Early Start' items are highlighted with a blue background, indicating they are the selected roles.

If you do not make a selection on this screen, you can still add **User Roles** on the results screen. This is shown later.

After you click the **Add** button the system will either load the results screen or will notify you of any errors. For example, **Login Name** must be unique, so if you enter a value that is already on the system, you'll receive a message that you must try again:

✘ * Login Name
 Requested login name is not available

Also, if the **Password** doesn't meet the required criteria, you will receive a message to try again....

✘ * Password
 Password length too short.

✘ * Password
 Password not complex enough.

If you successfully create an account, the Award System will display the results screen, as shown below:

User ID 74

* Login Name

Password Expires

* First Name

* Last Name

* Email Address

Effective Date

Termination Date

Last Login

[Select All](#) | [Select None](#)

User Roles			
Select	Role	Active	Organization
<input type="checkbox"/>	College TOPS	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE

Display Terminated Records

Once you see this screen, there is nothing further you need to do. However, you can still make edits if you choose. We will go over this screen on the following page.

#1, **User ID**, is a key field for LOSFA's internal processes and is not editable.

#s 2 through 9 have been covered already on page 16. **Password Expires** and **Last Login** are non-editable system fields, but the rest can be changed if needed.

A screenshot of a user profile form with the following fields and callouts:

- 1: User ID 74
- 2: * Login Name (text input: tops user)
- 3: Password Expires (text input: 10/18/2010)
- 4: * First Name (text input: John)
- 5: * Last Name (text input: Smith)
- 6: * Email Address (text input: jsmith@test.edu)
- 7: Effective Date (text input: 8/9/2010, calendar icon)
- 8: Termination Date (text input, calendar icon)
- 9: Last Login (text input)

#10, **Select All | Select None**, works as an option to #11, **Select**, when selecting a record or set of records.

#12, **Role**, is the role assigned to the user.

#13, **Active**, is a status indicator showing this role is available to the user when he or she logs in.

#14, **Organization**, is a dynamic field that you do not have to edit. It is automatically populated with your campus code.

#15, the **Add** button, will create another row in the User Roles section so you can assign more roles if needed.

#16, the **Remove** button, will remove any roles indicated in the **Select** column.

#17, the **Clear** button, returns you to the main User Accounts screen where you can add another account or look one up.

#18, the **Update** button, must be clicked if you change any values on this screen.

#19, the **Delete** button, removes the user account.

#20, the **Generate Password** button, creates a password based on the password requirements discussed in Part 2, **Passwords**.

A screenshot of the User Roles section with the following elements and callouts:

- 10: Select All | Select None (links)
- 11: Select (checkbox)
- 12: Role (dropdown: College TOPS)
- 13: Active (checkbox: checked)
- 14: Organization (dropdown: UNIVERSITY OF LA-MONROE)
- 15: Add (button)
- 16: Remove (button)
- 17: Clear (button)
- 18: Update (button)
- 19: Delete (button)
- 20: Generate Password (button)

In summary, you create an account by going to the **User Accounts** tab. This will open the main screen, where you will enter the required data and respond to any error prompts. Then you will click the **Add** button. This will open a second screen, the results screen, where you will click the **Clear** button if there are no changes and you are ready to return to the main screen. Otherwise you will make any edits needed, click the **Update** button, then click the **Clear** button.

B. How to Search for an Account—searching for an account is easy, as it uses the same screens you’ve already used to create an account. Sign in to the Award System and click the **User Accounts** tab. When the screen loads, pick a field as your search key—for example, Last Name or Login Name—then click the **Find** button:

The screenshot shows a web form for searching user accounts. The form includes the following fields and controls:

- * Login Name: [Text Input]
- * Password: [Text Input]
- Password Expires: [Text Input] with a calendar icon
- * First Name: [Text Input]
- * Last Name: [Text Input] containing the text "smith". This field is highlighted with a red box.
- * Email Address: [Text Input]
- Effective Date: [Text Input] with a calendar icon
- Termination Date: [Text Input] with a calendar icon
- Last Login: [Text Input]
- User Roles: [Dropdown Menu] with a scrollable list of roles including College, College Early Start, College GO Grant, College LEAP, College Rockefeller, College TOPS, College TOPS Tech Early Start, and College View Only.
- Display Terminated Records: [Checkbox]
- Buttons: Clear, Find (highlighted with a red box), and Add.

A red arrow points from the "Last Name" field to the "Find" button. A red text box on the left side of the form contains the instruction: "Enter a value into one of the fields then click the Find button."

Your search results will depend on how narrow or how broad your search parameters are. For example, searching by Login Name will return one record because the Login Names must be unique. However, searching by Last Name such as in the image above could return one or several records, depending on how common the name is. For this demonstration, we’ll search for “Smith”.

This is a sample results set from the search on the previous page—all users at your institution with a last name of “Smith” are shown here:

Select All | Select None

Users								
Select	User Login	Last Name	First Name	Email Address	Effective Date	Last Login	Password Expires	Role
<input type="checkbox"/>	tops user	Smith	John	jsmith@test.edu	8/9/2010	8/10/2010	10/18/2010	<ul style="list-style-type: none"> college tops
<input type="checkbox"/>	tops user 2	Smith	Don	donsmith@test.edu	8/9/2010			<ul style="list-style-type: none"> college es college leap college rock college ttes
<input type="checkbox"/>	tops user 3	Smith	Ron	ronsmith@test.edu	8/9/2010			<ul style="list-style-type: none"> college go college tops

Search Edit Delete

You can also search by multiple keys, such as first *and* last name. This can help narrow your search:

* First Name

* Last Name

If your search returns a unique record you will see the results screen, but if there are multiple records such as in the sample at the top of the page, you can access your desired record by checking off the record in the **Select** column:

<input checked="" type="checkbox"/>	tops user 3	Smith	Ron	ronsmith@test.edu
-------------------------------------	-------------	-------	-----	-------------------

Search Edit Delete

Selecting a record will activate the **Edit** and **Delete** buttons, as shown above. Accessing the record in question is just a matter of clicking the **Edit** button, and that is covered in our next topic, How to Edit an Account.

In summary, you find an account by going to the **User Accounts** tab. This will open the main screen, where you will enter your search parameters. Then you will click the **Find** button. This will either return a specific record or a record set. Select a record if necessary by checking the **Select** column.

C. How to Edit an Account—editing an account uses the same results screen that you’ve seen in previous pages. There can be several reasons you might need to edit an account: a user might need a name change; a user might have a new email address; a user might take on new duties and so needs new roles; a user might announce he or she is resigning; or a user might need a new password. All of those circumstances can be addressed on this screen.

In this first demonstration we will see changing Last Name and Email Address due to naming issues. Our test user’s name is “Smythe” instead of “Smith”, so the first step is to edit the affected fields:

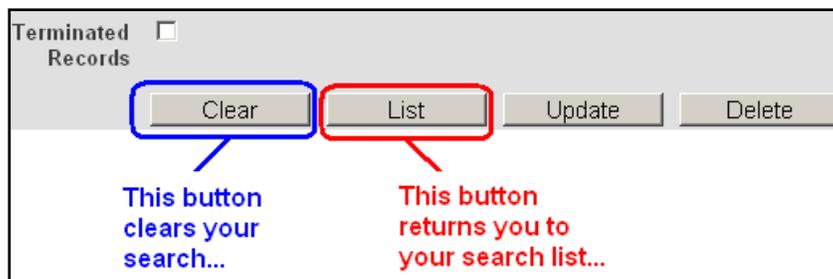
Next, you will click the **Update** button. Note that the screen operates slightly differently if you are editing from a list selection when compared with editing a record that was an exact match for your search. Look at the button options below:

When accessing a record from a direct search, make your edits, click the **Update** button, and then click the **Clear** button. This will return you to the User Accounts main screen.

When accessing a record from a list, make your edits then click the **Update** button. That will return you to the list selection.

If you bring up a record by mistake—making a typo in a search field, for example, and getting “Don” instead of “Dan”—you can exit the screen by clicking the **Clear** button.

However, if you use the **Clear** button in combination with a search list, you will erase your query results and go back to the main screen. But if you simply checked the wrong record from the list and don’t want to re-enter your search parameters, click the **List** button. That will return you to your record selection:



In summary, you edit an account by going to the **User Accounts** tab. This will open the main screen, where you will enter search parameters to “find” a record. When your record is on the screen you will edit the required fields then you will click the **Update** button:

- If your search returned one record, click the **Clear** button *after* clicking **Update**—this will return you to the main screen.
- If you selected your record from a search list, clicking **Update** will return you to your search list. Then you will click the **Search** button if you wish to go back to the main form to search again. Otherwise click the **List** button to return to the search list to select another record.

D. How to Add or Delete Roles—changing users’ roles is also done on the results screen under the User Accounts tab. These roles determine which functions users can perform. As discussed in Part 6, **User Accounts**, there are a number of different roles available to a user. These roles are “collections” of functions that are associated with one of LOSFA’s programs. For example, making TOPS payment requests, entering TOP grades, and downloading TOPS rosters are separate functions in the Award System. Access to each of these functions is through a role—in this case, the TOPS role. So each role grants access to the functions needed for a given program.

Depending on your institution’s requirements, you may have users who need to do everything. You may have users who are only responsible for one program, or you may have users whose duties cover multiple programs. The Award System allows for all of these scenarios, because you can assign your users multiple roles. However, a user can only perform one role at a time.

To demonstrate the difference between roles and functions and to demonstrate how to add or delete roles, consider the scenarios on the following pages....

“John Smith” handles TOPS at his workplace, and his account is the one on the right. Notice his role is **College TOPS**. His co-worker, “Ted Smith”, handles Early Start. Notice that Ted’s role is **College Early Start**:

* Login Name: tops user
 Password Expires:
 * First Name: John
 * Last Name: Smith
 * Email Address: jsmith@test.edu
 Effective Date: 8/9/2010
 Termination Date:
 Last Login:

Select All | Select None

User Roles			
Select	Role	Active	Organization
<input type="checkbox"/>	College TOPS	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE

Add Remove

* Login Name: es user 1
 Password Expires:
 * First Name: Ted
 * Last Name: Smith
 * Email Address: tsmith@test.edu
 Effective Date: 8/12/2010
 Termination Date:
 Last Login:

Select All | Select None

User Roles			
Select	Role	Active	Organization
<input type="checkbox"/>	College Early Start	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE

Add Remove

Functions for both programs would include making payment requests, submitting grades, and retrieving roster data. But because these functions differ from program to program, those functions specific to a program are “bundled” into a role. At first glance, there is no difference between the roles—notice both John and Ted have the same tabs:

Home Students Academics Payments Reports Upload Files

Welcome back **John Smith**. Your last visit was 8/10/2010 12:40:23 PM.

School: UNIVERSITY OF LA-MONROE

Home Students Academics Payments Reports Upload Files

Welcome **Ted Smith**. Your last visit was 8/10/2010 12:23:03 PM.

School: UNIVERSITY OF LA-MONROE

However, note their views of the Academics tab differ:

Home Students Academics Payments Reports Upload Files

(Academic Menu)

(Academic Menu)

TOPS Grade Submit **Information functions are provided**

TOPS Grade Submit

Home Students Academics Payments Reports Upload Files

(Academic Menu)

(Academic Menu)

Early Start Grade Submit **Information functions are provided**

Early Start Grade Submit

John, on the right, sees only the **TOPS Grade Submit** function because he has the **College TOPS** role. In comparison, Ted sees the **Early Start Grade Submit** function because he has the **College Early Start** role.

Most of the screens in Award System work in a similar fashion, and it is this granularity which allows an Account Administrator to customize a user’s access to the Award System. Consider this scenario—“Brad Smith” has three different roles, **College Early Start**, **College LEAP**, and **College Rockefeller**.

Select	Role	Active	Organization
<input type="checkbox"/>	College Early Start	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE
<input type="checkbox"/>	College LEAP	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE
<input type="checkbox"/>	College Rockefeller	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE

This is what Brad sees when he signs in. Note that he has a new item at the bottom of his screen—this drop-down shows his Current Role is **College Early Start**. John and Ted do not have this drop-down selector because they only have one role. Brad, however, has three, but he can only operate under one role at a time.

Switching roles is simple—first, choose another role from the drop-down. In this case, **College LEAP** has been selected:

This triggers a new link that will appear to the right of the drop-down. Clicking **Change Role** will do just that—change Brad’s role from **College Early Start** to **College LEAP**. His new screen is shown on the next page.

Notice Brad now has different tabs—**Academics** and **Payments** are gone now, replaced by **LEAP**. This new tab is where the **LEAP** functions are collected.



In this scenario, the user is responsible for entering data for all LOSFA’s programs. Note however, that “Lisa Smith” only has one role—**College**. The **College** role is like a “super-user,” because it automatically has access to all the tabs and functions. This prevents the Account Administrator from having to give a single every individual role to do each function.

Login Name: tops user 5
 Password Expires:
 First Name: Lisa
 Last Name: Smith
 Email Address: lsmith@test.edu
 Effective Date: 8/10/2010
 Termination Date:
 Last Login:

[Select All](#) | [Select None](#)

User Roles			
Select	Role	Active	Organization
<input checked="" type="checkbox"/>	College	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE

Now that we have explained the distinction between roles and functions, we will use Brad to demonstrate how to add or delete roles.

First, **Find** Brad’s account, and go to the User Roles area at the bottom of the results screen.

[Select All](#) | [Select None](#)

User Roles			
Select	Role	Active	Organization
<input type="checkbox"/>	College Early Start	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE
<input type="checkbox"/>	College LEAP	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE
<input type="checkbox"/>	College Rockefeller	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE

Brad is no longer responsible for LEAP so the Account Administrator needs to **Remove** the appropriate role from Brad's list. To do this, check the **College LEAP** role in the **Select** column, then click the **Remove** button.

User Roles	
Select	Role
<input type="checkbox"/>	College Early Start
<input checked="" type="checkbox"/>	College LEAP
<input type="checkbox"/>	College Rockefeller
<input type="button" value="Add"/> <input type="button" value="Remove"/>	

The screen will refresh, showing that **College LEAP** is no longer in the list. To finalize this change, next click the **Update** button. After that, you can click **Clear** if you want to search for another user, or you can click any of the other tabs to perform other functions.

Select	Role
<input type="checkbox"/>	College Early Start
<input type="checkbox"/>	College Rockefeller
<input type="button" value="Add"/> <input type="button" value="Remove"/>	
<input type="button" value="Clear"/> <input type="button" value="Update"/>	

Giving a user additional roles is done by clicking the **Add** button. In this example, Ted from the earlier demonstrations is taking on GO Grant duties.

First, bring up Ted's record in the User Accounts tab then look at the User Roles area at the bottom of the screen. Click the **Add** button.

User Roles			
Select	Role	Active	Organization
<input type="checkbox"/>	College Early Start	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE
<input type="button" value="Add"/> <input type="button" value="Remove"/>			

Another row will appear, as shown here. This is where you would choose the role.

User Roles			
Select	Role	Active	Organization
<input type="checkbox"/>	College Early Start	<input checked="" type="checkbox"/>	UNIVERSITY OF LA-MONROE
<input type="checkbox"/>		<input checked="" type="checkbox"/>	← A blank row has appeared...
<input type="button" value="Add"/> <input type="button" value="Remove"/>			

Because Ted works with GO Grant, he needs to have the **College GO Grant** role. Click the drop-down selector to find it:

<input type="checkbox"/>	College
<input type="checkbox"/>	College Early Start
<input type="checkbox"/>	College GO Grant
<input type="checkbox"/>	College LEAP
<input type="checkbox"/>	College Rockefeller
<input type="checkbox"/>	College TOPS
<input type="checkbox"/>	College TOPS Tech Early Start
<input type="checkbox"/>	College View Only

The next step to finalize your change to Ted’s account is to click the **Update** button:

After the record has been saved, you can click the Clear button to reset the form for another search or you can click another tab to perform other functions.

In summary, “functions” represent individual tasks, such as making a payment request or downloading a roster. “Roles” represent groups of functions that are associated with a program—for example, a College TOPS role would have all the functions that a TOPS user would need. You can assign roles to a user during the account creation step (covered on pages 15-19) or after the fact, such as in the above demonstrations. To add roles after the fact, go to the **User Accounts** tab. This will open the main screen, where you will search for the appropriate user. When the screen has loaded, go down to the User Roles area at the bottom of the screen, then click the **Add** button. Select the appropriate role in the new row, then click the **Update** button, and finally click the **Clear** button.

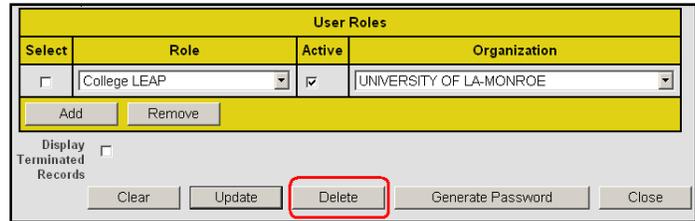
E. How to Terminate an Account—terminating an account is a simple matter. Start a search for the record on the User Accounts tab as usual. If your search returns a number of hits—such as this example, where the search key of “Smith” returned three hits—first check the appropriate entry in the **Select** column then click the **Delete** button.

Select	User Login	Last Name	First Name	Email Address	Effective Date	Last Login	Password Expires	Role
<input type="checkbox"/>	tops user 5	Smith	Lisa	lsmith@test.edu	8/10/2010	8/12/2010	10/21/2010	• college
<input type="checkbox"/>	es user 1	Smith	Ted	tsmith@test.edu	8/12/2010	8/12/2010	10/21/2010	• college es
<input checked="" type="checkbox"/>	tops user 8	Smith	Rocky	zxcv@test.com	8/13/2010	8/12/2010	10/21/2010	• college rock

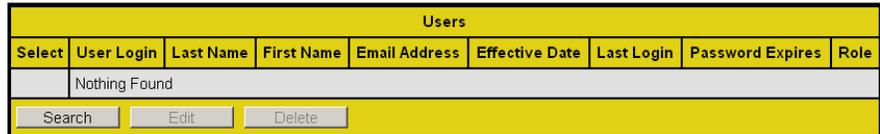
That will remove the record and return you to your search results, as shown here.

Select	User Login	Last Name	First Name	Email Address	Effective Date	Last Login	Password Expires	Role
<input type="checkbox"/>	tops user 5	Smith	Lisa	lsmith@test.edu	8/10/2010	8/12/2010	10/21/2010	• college
<input type="checkbox"/>	es user 1	Smith	Ted	tsmith@test.edu	8/12/2010	8/12/2010	10/21/2010	• college es

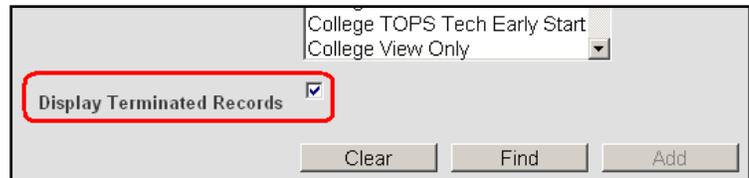
If your search is specific and returns a unique record, that record will appear in the results screen. In this case, the **Delete** button is near the bottom of the page, beneath the User Roles, as shown here.



Clicking the **Delete** button will remove the record and then the search list screen will return.



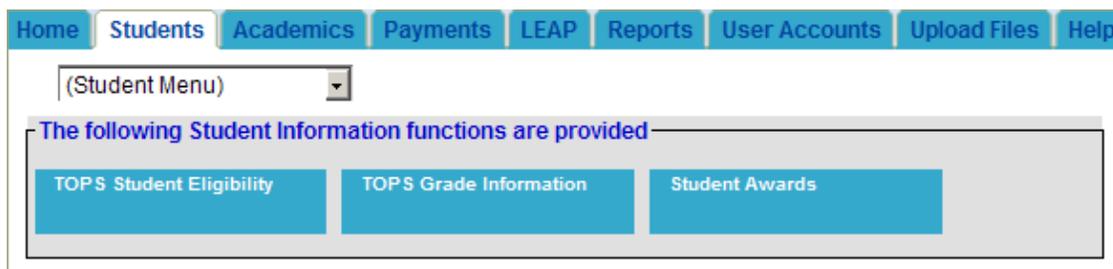
In the event you wish to search for records that you have deleted, click the User Accounts tab as usual and enter your search parameters. Before you click the **Find** button, however, be sure to check the **Display Terminated Records** box. Otherwise the record will not show up.



In summary, you delete an account by going to the **User Accounts** tab. This will open the main screen, where you will enter your search parameters. If your search returns an exact match, you will click the **Delete** button near the bottom of the screen. If your search returns a list of matches, check the appropriate record in the **Select** column and then click the **Delete** button. Finally, to search for deleted records, check the **Display Terminated Records** box before searching.

How to Look up a Student:

Looking up a student—to review TOPS eligibility, for example, or to see what awards a student has received—is done on the Students tab:



For this demonstration, we will click the **TOPS Student Eligibility** button and perform a search by setting two filters—one for Last Name and one for First Name:

One record is returned, showing only basic information: name and SSN:

Rows per page 10			
Students - (1) record(s) found.			
Select	SSN	First Name	Last Name
<input type="radio"/>	999999999	ELVIS	PRESLEY
View Close			

To access more data about a record you must select it. To do this, click the button under the Select column. This will make the View button active:

Rows per page 10			
Students - (1) record(s) found.			
Select	SSN	First Name	Last Name
<input checked="" type="radio"/>	999999999	ELVIS	PRESLEY
View Close			

Clicking the View button opens the TOPS Student Eligibility screen, allowing an extensive over view of the student’s data: application received date, cumulative hours, last term paid, etc. This is shown on the next page.

[Home](#)
[Students](#)
[Academics](#)
[Payments](#)
[LEAP](#)
[Reports](#)
[User Accounts](#)
[Upload Files](#)

TOPS Student Eligibility ▾

TOPS Eligibility Results

as of 04/06/2006
[Click here for explanation of terms](#)

This *TOPS Eligibility Results* screen reflects only current academic year information.

You have not met the requirements for the following reasons:

- Over 2 Yr Award Not Acptpd - Inelig

College Data	Personal Data
Grade College: <i>No Grade Records Found</i> Grade Term: <i>No Grade Records Found</i> College GPA: <i>No Grade Records Found</i> Cumulative Hours: <i>No Grade Records Found</i> Renewal Year: 2008 No. of Years Paid: 0.00 Earned Credit Hrs: <i>No Grade Records Found</i> Pay Status: NIY Last Term Paid: <i>No Payment Request Core Records Found</i> Only Term Eligible: <i>No Award Term Records Found</i>	SSN: 999999999 Name: ELVIS PRESLEY Birthdate: 1/8/1935 App Received Date: 1/22/2009
	High School Data
	High School Name: HOUNDDOG HIGH SCHOOL ACT Score: 19 High School GPA: 0.00 High School Core Credits: 16.5

Clicking the **Return** button will take you back to the Search screen where you can edit the filters to search again.

Student Awards will allow you a quick glimpse into what awards a student may have. In this demonstration, we will set a filter to search by last name and use the remaining defaults:

Student Awards ▾

Search Student Awards

<input type="button" value="Find"/>	Filter 1	Last Name ▾	Smith
<input type="button" value="Find Alias"/>	Filter 2	(Field to search) ▾	
	Program	All ▾	
	Display	10 Results ▾	

The search results are shown on the next page.

Rows per page 10

Students - Only (10) results displayed. Please narrow your search request.

SSN	Last Name	First Name	Awards
██████	SMITH	J█████	Date 6/22/2007 Award TOPS OPPORTUNITY
██████	SMITH	S█████	Date 11/26/2009 Award TOPS OPPORTUNITY Date 9/24/2009 Award GO GRANT
██████	SMITH	J█████	Date 6/23/2005 Award TOPS OPPORTUNITY
██████	SMITH	C█████	Date 8/9/2001 Award TOPS TECH
██████	SMITH	C█████	Date 6/24/2004 Award TOPS PERFORMANCE
██████	SMITH	J█████	Date 6/28/2007 Award TOPS TECH Date 1/10/2008 Award GO GRANT
██████	SMITH	K█████	Date 6/22/2007 Award TOPS OPPORTUNITY
██████	SMITH	M█████	Date 10/23/1998 Award TOPS OPPORTUNITY
██████	SMITH	M█████	Date 5/31/2007 Award TOPS TECH
██████	SMITH	L█████	Date 6/22/2006 Award TOPS OPPORTUNITY

Close

SSNs have been masked for security reasons

The screen shows you the awards a student has and the date awarded. However, you can set the search to return only certain awards— simply make a selection in the **Program** drop-down list. All the financial aid programs LOSFA administers will be on this list, and as more programs are added, this list will expand as needed:

Search Student Awards

Find Filter 1 (Field to search)

Find Alias Program All

Display All

Rows per page 10

SSN Last Name

Close

- EARLY START
- GO GRANT
- HCELP DOCTORATE
- HCELP MASTERS
- LEAP
- LOUISIANA HONORS PROGRAM
- ROCKEFELLER
- ROCKEFELLER GRADUATE
- ROCKEFELLER UNDERGRAD
- SLEAP
- TOPS HONORS
- TOPS INELIGIBLE
- TOPS OPPORTUNITY
- TOPS PERFORMANCE
- TOPS TECH
- TTES
- TUITION ASSISTANCE PROGRAM

In summary, looking up a student is done on the Students tab. Choose your function then enter your search requirements by adding filters such as last name or SSN. Click the **Find** button to start your search, check the record in the **Select** column, and then click the **View** button. Also, please note that because the navigation framework exists throughout the site, you can also **Find** payment requests and grade submissions by searching on the tab.

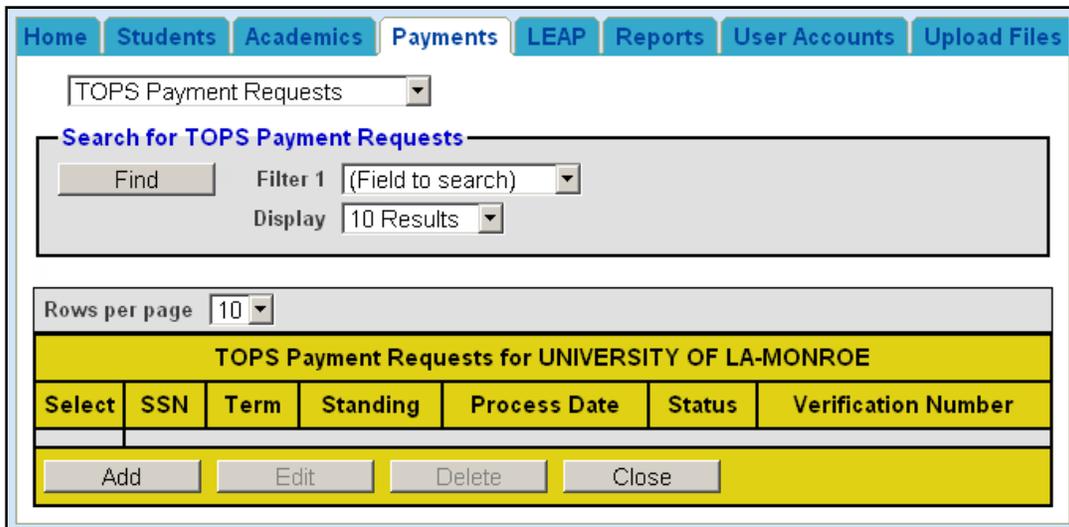
How to Submit a Payment Request or Grade:

This section will cover submitting individual payment requests or grade records. Uploading batch files is covered later.

Making a payment request is done on the **Payments** tab. Depending on your role, you may see different functions than those shown here. For example, if your role is **College TOPS**, you would only see the **TOPS Payment Requests** function.



In this first example, we will make a **TOPS Payment Request**. Clicking its function tab opens the screen shown below:



Click the **Add** button to make a new payment request. That will open a data entry screen for you, shown on the next page.

Enter the fields and respond to any error prompts, then click the **Add** button:

TOPS Payment Requests

* College Code: 002010000 LSU-BATON ROUGE 002010

* SSN: 123456789 (no dashes, include leading zeros - e.g. 007854321)

* Academic Term: 1S2013 1S2013 - FALL SEMESTER 2012

* Tuition Amount: 2000.00 This field cannot be populated if a National Guard Amount exists. Amount must be less than or equal to 9999.99.

* Stipend Amount: 0.00 Amount must be less than or equal to 9999.99.

* National Guard Amount: 0.00 This field cannot be populated if a Tuition Amount exists.

* Program Type: Academic

* Academic Standing: 00 - \$ - Continuous Enrollment

Add Close

* Indicates a required field

Note that \$ in Academic Standing requires a \$ amount either as Tuition, Stipend or NG.

* Academic Standing (Select a Standing)

(Select a Standing)

ST - Transfer from Semester Organization

TS - Transfer to Semester Organization

00 - \$ - Continuous Enrollment

11 - \$ - Accelerated - Licensed Practical Nurse

DB - \$ - Dual Billed Student

EP - Eligible Part-Time

FL - Reversal of Less than Full Time - School Reported

FT - First Time Full Time

GN - Reversal of National Guard

GP - \$ - Post-Graduate

LF - Less than Full Time - School Reported

NG - \$ - Eligible National Guard Stipend

OA - Over-Awarded

PS - \$ - Professional Student

After you've completed your data and clicked the **Add** button, the screen will reset and will show you that the record has been saved.

Add Close

Record Saved.

You would then either enter another payment request or click the **Close** button. If you click the **Close** button, the screen will back out and show you your saved record. To edit or delete the record, you would first check it in the **Select** column, and that would activate the **Edit** and **Delete** buttons:

TOPS Payment Requests

Search for TOPS Payment Requests

Find Filter 1 (Field to search) Display 10 Results

Rows per page 10

Select All | Select None

TOPS Payment Requests for UNIVERSITY OF LA-MONROE						
Select	SSN	Term	Standing	Process Date	Status	Verification Number
<input type="checkbox"/>	987654321	1S2010	FT	8/16/2010	Pending	TO-1040

Add Edit Delete Close

Note that you would also use this screen to search for payment request records. Like with any of the other screens in the Award System, select a filter or filters and then click the **Find** button:

Home Students Academics Payments LEAP Reports User Accounts Upload Files

TOPS Payment Requests

Search for TOPS Payment Requests

Find Filter 1 (Field to search) Display (Field to search)

Rows per page 10

Select All | Select None

TOPS Payment Requests for UNIVERSITY OF LA-MONROE - (1) record(s) found.

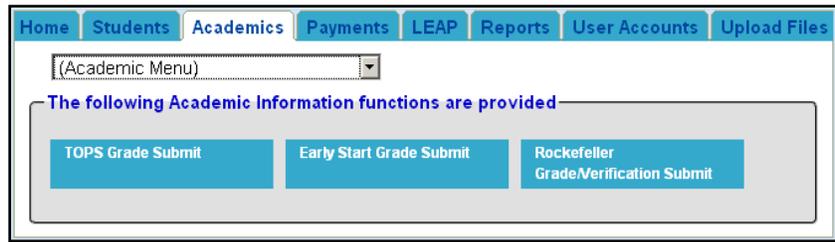
Select	SSN	Term	Standing	Process Date	Status	Verification Number
<input type="checkbox"/>	987654321	1S2010	FT	8/16/2010	Pending	TO-1040

Add Edit Delete Close

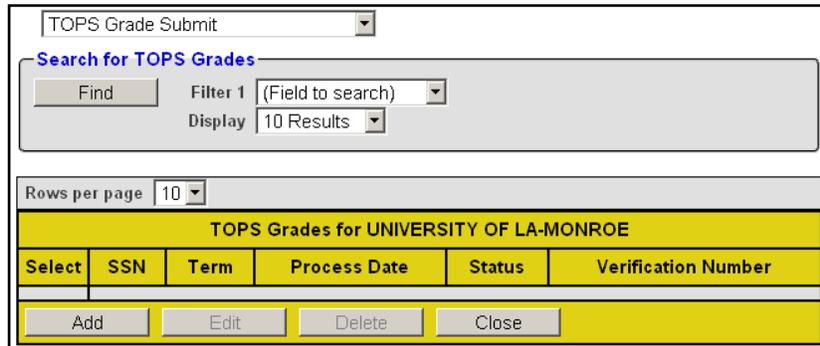
Use filters to search for payment requests.

Other Payment Request functions work much the same way—**Find, Add, Select, Edit, Delete**—all these are common throughout the Award System, so apart from unique features of any given program, working in one screen is not much different from working in the others.

Extending that concept further, you will see that loading grades works much the same way. These functions are located on the Academics tab:



Clicking the **TOPS Grade Submit** button will bring up a screen that by now should look familiar:



Clicking the **Add** button above will open the **TOPS Grade Submit** screen, shown below:

The screenshot shows the 'TOPS Grade Submit' form. It has a dropdown for 'TOPS Grade Submit'. Fields include:

- SSN** (required): Text input with a note: '(no dashes, include leading zeros - e.g. 007654321)'
- Academic Term** (required): Text input
- Degree**: Dropdown menu with 'No Degree' selected. Note: 'If student has a degree, the degree date is required.'
- Program Type** (required): Dropdown menu with 'Academic' selected.
- Ethnic Code** (required): Dropdown menu with '(Select a Standing)' selected.
- Academic Standing** (required): Dropdown menu with '(Select a Standing)' selected.
- Quality Points**: Text input
- Hours Attempted**: Text input
- Hours Earned**: Text input
- Incomplete Hours**: Text input with '0' entered.

 At the bottom are 'Add' and 'Close' buttons, and a legend: '* Indicates a required field'.

Simply fill in the fields. Respond to any error prompts, then click the **Add** button. You will receive a “Record Saved” notice and the screen will reset itself. You can then enter more data for another record or you can click the **Close** button.

If you click the **Close** button, you will see your record/s listed, as shown here:

TOPS Grades for UNIVERSITY OF LA-MONROE					
Select	SSN	Term	Process Date	Status	Verification Number
<input type="checkbox"/>	999999999	2S2010	8/17/2010	Pending	TO-1060
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Close"/>					

In summary, you enter individual payment requests and grade records from the **Payments** and **Academics** tabs. Select the appropriate function and enter your data, correcting any error prompts, then click the **Add** button. This will save the record, then you can **Add** another, or you can **Close** the screen. Because the navigation cues a part of the same framework, entering data for the different functions works very similarly. Also note that you can **Find** your submissions—just set a filter on the desired parameter, such as Status or Verification Number.

How to Download a Roster:

For this demonstration, we will use the TOPS Payment Roster:



Clicking the **TOPS Payment Roster** link will open a new window; in this you will see a “Loading” image. Wait for this process to finish.



When all the options have loaded, your Roster selection screen will look like this one:

The screenshot shows the LOSFA (Louisiana Office of Student Financial Assistance) interface for the TOPS Payment Roster. At the top left is the LOSFA logo. The main title is "TOPS Payment Roster".

On the left, there is a "College" dropdown menu with "UNIVERSITY OF LA-MONROE" selected.

There are three dropdown menus for selection criteria:

- Term Year:** A list of years from 1998 to 2011, with "ALL" selected at the top.
- Term Type:** A list of program types: ALL, A-Accelerated Program, Intercession, P-Proprietary and Cosmetology, S-Semester, and T-Quarter. "ALL" is selected.
- Term Number:** A list of numbers 1 through 5, with "ALL" selected at the top.

Below these is a larger dropdown menu for "Term", showing a list of specific term identifiers such as "1A2008-FALL QUARTER 2007 - ACCELERATED PROGRAM" and "1I2003-FALL SEMESTER INTERSESSION 2002". "ALL" is selected at the top.

On the right side, there are four date and invoice selection fields:

- From Date:** An empty date input field.
- To Date:** An empty date input field.
- From Invoice:** An empty text input field.
- To Invoice:** An empty text input field.

Below these fields is the "Select Output Type:" section with two radio buttons:

- Browser
- Download

At the bottom right is a "Run Report" button.

We will describe the Payment Roster here.

#1, #2, and #3—**Term Year**, **Term Type**, and **Term Number**—work separately or together, so you can create a custom filter for your Payment Roster. For example, you could specify **Term Year** and **Term Number** while leaving **Term Type** as a default, or you could do just the opposite and specify **Term Type** while leaving the others as defaults. You can also make multiple selections within a filter by using Windows keyboard shortcuts. For example, if you want **Term Numbers** 1, 3, and 5, click them while holding down the **Ctrl** key. Or, if you want **Term Numbers** 1 through 3, click 1, hold down the **Ctrl** key, then click 3—that will automatically highlight the range you selected. We will demonstrate this on the next page.

TOPS
Payment Roster

College _____

5 From Process Date: _____

6 To Process Date: _____

7 From Invoice Number: _____

8 To Invoice Number: _____

9 Enter SSN: _____

10 Select Output Type:

- Browser
- Print (PDF)
- Spreadsheet (XLS)
- Download

1 Term Year: ALL, 2017, 2016, 2015, 2014, 2013, 2012, 2011, 2010, 2009, 2008, 2007

2 Term Type: ALL, A-Accelerated Program, I-Intersession, P-Proprietary and Cosmetology, S-Semester, T-Quarter

3 Term Number: ALL, 1, 2, 3, 4, 5

4 Term: ALL, 1A2008-1A2008 - FALL QUARTER 2007 - ACCELERATED, 1A2009-1A2009 - FALL QUARTER 2008 - ACCELERATED, 1A2010-1A2010 - FALL QUARTER 2009 - ACCELERATED, 1A2011-1A2011 - FALL QUARTER 2010 - ACCELERATED, 1A2012-1A2012 - FALL QUARTER 2011 ACCELERATED, 1A2013-1A2013 - FALL QUARTER ACCELERATED 2012, 1A2014-1A2014 - FALL QUARTER 2013 ACCELERATED, 1I2003-1I2003 - FALL SEMESTER INTERSESSION 2002, 1I2004-1I2004 - FALL SEMESTER INTERSESSION 2003, 1I2005-1I2005 - FALL SEMESTER INTERSESSION 2004

11 Run Report

#4, **Term**, is a “short-cut” to pre-defined term values, such as “1S2010” or “3T2010”. You would not use **Term Year**, **Term Type**, or **Term Number** *with* **Term**—they would counteract one another.

#5 and #6—**From Process Date** and **To Process Date**—limit your search by processed date. If you don’t enter any values, the report will pull everything it can find that matches your term selection/s (whether your “term” was set by the **Term** field itself or by a combination of **Term Year**, **Term Type**, and/or **Term Number**). Two, if you enter a **From Process Date** but not a **To Process Date**, the system will default the **To Process Date** to the same value. In other words, if you only want records by one processed date, you only have to enter the value once, on the **From Process Date** field.

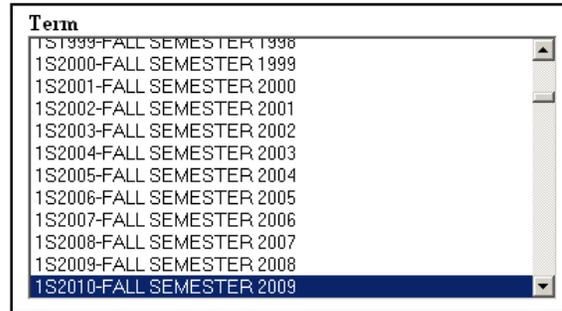
#7 and #8—**From Invoice Number** and **To Invoice Number** —these fields allow you to filter by the invoice number. Enter a value in **From Invoice Number** and the system will search for anything attached to that one invoice. Enter another invoice number in **To Invoice Number**, and the system will return any records in that range of invoice numbers.

#9—**Enter SSN**—allows you to retrieve a single student.

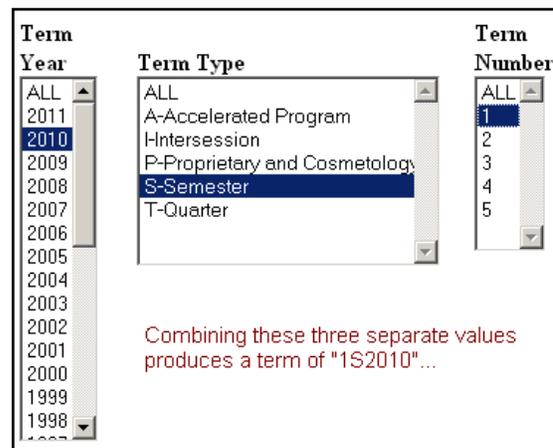
#10—**Select Output Type**—allows you to choose how you get your data back from the query you’ve just built. Currently there are four options: “Browser” means the data will come back on your screen in your browser window; “Download” returns your results in flat-file format; “Print” places the data in a .pdf; and “Spreadsheet” places the data in an Excel spreadsheet that allows you to ‘slice and dice’ the data.

#11—the **Run Report** button—launches your query. Your data will come back to you in a new blank window (browsers that support tabs *may* open it in a new tab). Please note—you must not close this window until you’ve gotten your results. Otherwise you will end your query session and you’ll have to start again. Also note that depending on how broad your query is, it may take several minutes to return your results, but that’s why we open it in a new window—it will run in the background until it finishes, allowing you to do other tasks in your other windows.

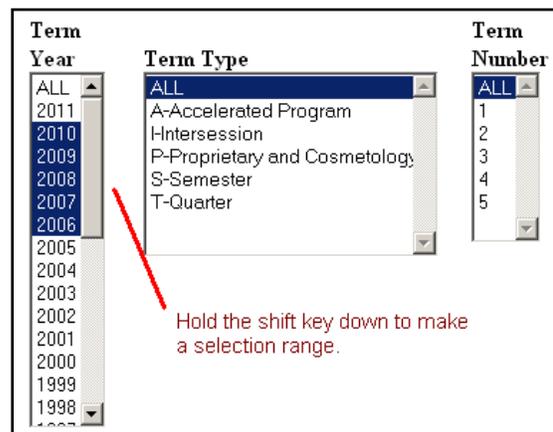
To demonstrate the various search options we will begin with a simple query that uses one filter, **Term**. The search value, “1S2010,” would then search for any payment request you had made for that term.



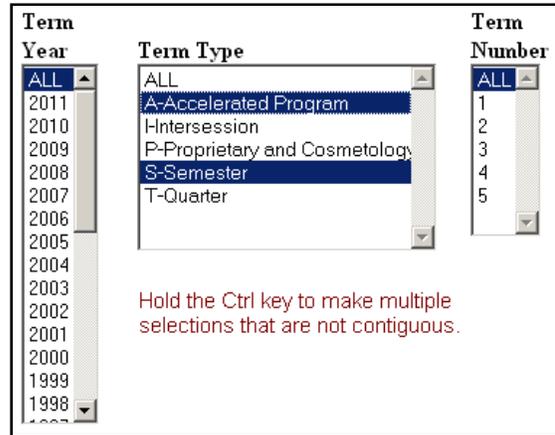
You could build the same query yourself using **Term Year**, **Term Type**, and **Term Number**, as shown in this image. **Term Year** is set to “2010, **Term Type** is “S” for semester, and **Term Number** is set to “1”...together these values form “1S2010” as the search key...the same thing that was done in one click using **Term**. Though it may seem like these three fields are redundant or extra work, they actually give you more power than you had in the TOPS Portal. Observe the next examples...



Here **Term Year** is a range...click one value, hold down the Shift key, then click another value...everything in between will be selected. In this case, any payment request for the academic years 2006 through 2010 will be returned...

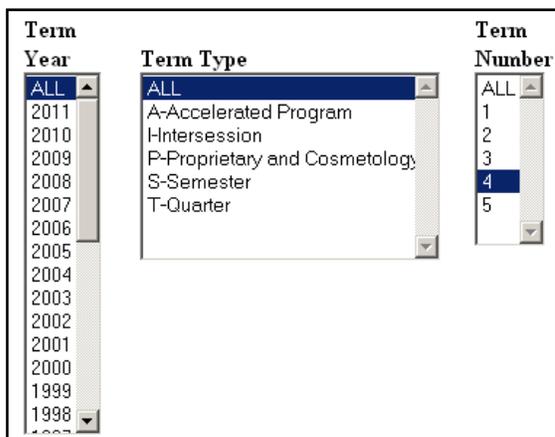


Here **Term Type** has multiple values...make a selection, hold down the Ctrl key, then make another selection. This allows you to choose items which are not contiguous. In this case, any payment requests for a semester or for an accelerated program will be returned...

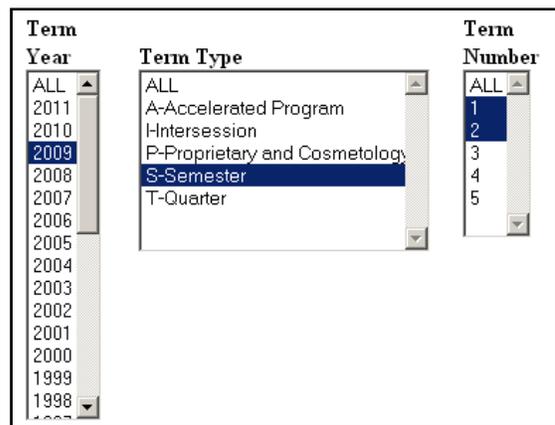


Hold the Ctrl key to make multiple selections that are not contiguous.

Here **Term Number**, set to “4,” would return any payment requests made for a Summer quarter or Fall quarter Intersession....



The power of these three fields lies in how you combine them. You can customize your search to fit your needs. This example will return all Fall and Spring semester payment requests for academic year 2009.



Note that the larger your search set is, the longer it will take to build. If your search is taking too long, try narrowing the scope of your search.

Other search options include searching by date range. You can manually type the dates into the fields or you can use the date pickers (the tiny calendar icons) to choose your dates. This example searches for payments requests processed from May 1st, 2010, through the end of July...

From Process Date:	<input type="text" value="05/01/2010"/>	
To Process Date:	<input type="text" value="07/31/2010"/>	

If you are searching for payment requests processed on one particular date, simply fill in the **From Date** as in this example. **To Date** will default to the same value so you won't have to enter it twice.

From Process Date:	<input type="text" value="05/01/2010"/>	
To Process Date:	<input type="text" value="05/01/2010"/>	

You can also search by invoice number. This would be helpful if your school participates in EFT and you wanted to limit your search to just those students tied to the invoice number in your email notification.

From Invoice Number:	<input type="text" value="999999101032"/>
To Invoice Number:	<input type="text"/>

We will use this last search option to show you the new TOPS Payment Roster....

Enter the invoice number...

From Invoice Number:	<input type="text" value="999999101032"/>
To Invoice Number:	<input type="text"/>
Enter SSN:	<input type="text"/>
Select Output Type:	<input checked="" type="radio"/> Browser <input type="radio"/> Print (PDF) <input type="radio"/> Spreadsheet (XLS) <input type="radio"/> Download

Leave the output type as "Browser" ...

Then click the **Run Report** button....

This will open a new, blank window (or tab) where your query will appear.

State of Louisiana
Office of Student Financial Assistance
TOPS Payment Roster

College: UNIVERSITY OF HART-KNOX Date: 08/19/2010

Term: 2S2010 SPRING SEMESTER 2010 Page: 1

Requested Invoices: 999999101032-999999101032

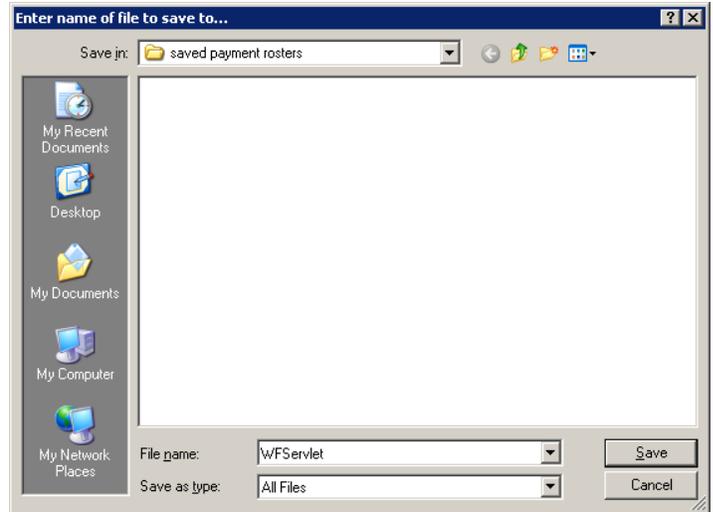
Social Security Number	Name	Tuition Amount Paid	Stipend Amount Paid	National Guard Paid	Invoice Number	Payment Request Date	Process Date
111-22-3333	EINSTEIN, ALPHONSE Q	\$1,353.00	\$0.00	\$0.00	999999101032	02/11/2010	02/09/2010
222-33-4444	PYTHON, MONTY	\$1,353.00	\$0.00	\$0.00	999999101032	02/11/2010	02/09/2010
333-44-5555	HOGAN, HULK	\$1,353.00	\$0.00	\$0.00	999999101032	02/11/2010	02/09/2010
444-55-6666	DURDEN, TYLER	\$1,834.00	\$0.00	\$0.00	999999101032	02/11/2010	02/09/2010
		\$0.00	\$200.00	\$0.00	999999101032	02/11/2010	02/09/2010
555-66-7777	FLOYD, PINK	\$1,353.00	\$0.00	\$0.00	999999101032	02/11/2010	02/09/2010
666-77-8888	WAYNE, BRUCE	\$1,353.00	\$0.00	\$0.00	999999101032	02/11/2010	02/09/2010

This is the sample payment roster that came up in your browser from your invoice number search. As you can see, the number circled in the sample image above matches that from our sample search image at the bottom of the previous page. Whatever search parameters you use in your query will be copied into this same area.

For downloading, click the Run Report button and just like with the browser option, a new window will open. When the file is complete, your browser will prompt you and ask you what to do with the file. Each browser behaves differently, but you should see something like the examples below. The one on the left is Firefox 3; the one on the right is IE6:



You would save the file on your computer, where you could then import the roster in question into your institution's systems. Depending on your browser, the file name of the roster will be "WFServlet" or something similar:



Just rename the file to something meaningful to your system:



If you open the file you will see it is the same file format that the TOPS Portal has been using—your processes will not have to be changed to import these files:

YourFilenameHere.txt - Notepad						
File	Edit	Format	View	Help		
111223333	EINSTEIN	ALPHONSE	Q99999999	1353	0	02010021125201020100209
222334444	PYTHON	MONTY	999999999	1353	0	02010021125201020100209
333445555	HOGAN	HULK	999999999	1353	0	02010021125201020100209
444556666	DURDEN	TYLER	999999999	1834	0	02010021125201020100209
444556666	DURDEN	TYLER	999999999	0	200	02010021125201020100209
555667777	FLOYD	PINK	999999999	1353	0	02010021125201020100209
666778888	WAYNE	BRUCE	999999999	1353	0	02010021125201020100209

Compare the data in the roster download sample above with the roster browser sample at the top of the previous page. As you can see, the fields have the same values.

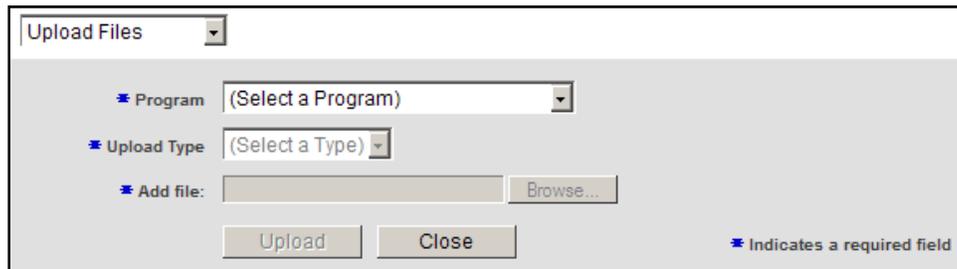
In summary, the Reports tab allows you to access reports and rosters for all LOSFA-administered financial aid programs. All give you the option to tailor search parameters to your needs and to access the data in browser view, as a .pdf file, as an Excel spreadsheet or to download a flat file in the format specified by the program for processing by your campus processes.

How to Upload a File:

The **Upload Files** tab allows you to upload batch files as rows of data 'in bulk and to review uploads you have sent for processing:



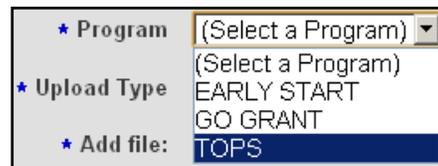
For this demonstration we will upload a TOPS Payment Request batch file. Clicking the **Upload Files** button will open the screen shown below:



The 'Upload Files' form contains the following fields and buttons:

- Upload Files (dropdown menu)
- * Program (dropdown menu, value: (Select a Program))
- * Upload Type (dropdown menu, value: (Select a Type))
- * Add file: (text input field) [Browse...]
- Upload (button)
- Close (button)
- * Indicates a required field (text)

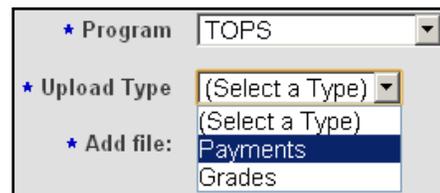
Next, select the appropriate program in the **Program** drop-down field. Since this is a TOPS Payment Request, select "TOPS":



The dropdown menu for the Program field is open, showing the following options:

- (Select a Program)
- (Select a Program)
- EARLY START
- GO GRANT
- TOPS (highlighted)

After making your **Program** selection, the **Upload Type** field will become active. This is where you would indicate if your file is a payment request or a grade submission. Since this is a TOPS Payment Request, select "Payments":



The dropdown menu for the Upload Type field is open, showing the following options:

- (Select a Type)
- (Select a Type)
- Payments (highlighted)
- Grades

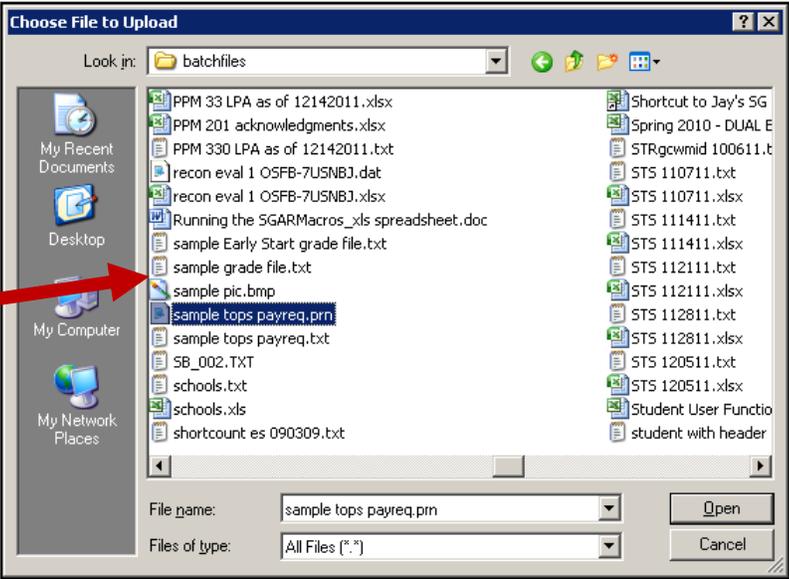
Once the **Program** and **Upload Type** have been set, the **Browse** button will become active:



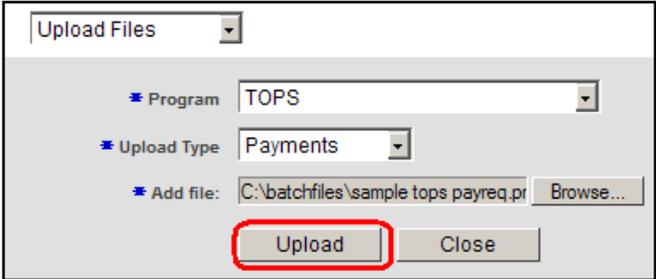
The 'Add file' field is now active, and the 'Browse...' button is highlighted.

Click the **Browse** button to navigate to your file's location. Double-click the filename of your upload file—in this case, "sample tops payreq.prn"—then click the **Open** button:

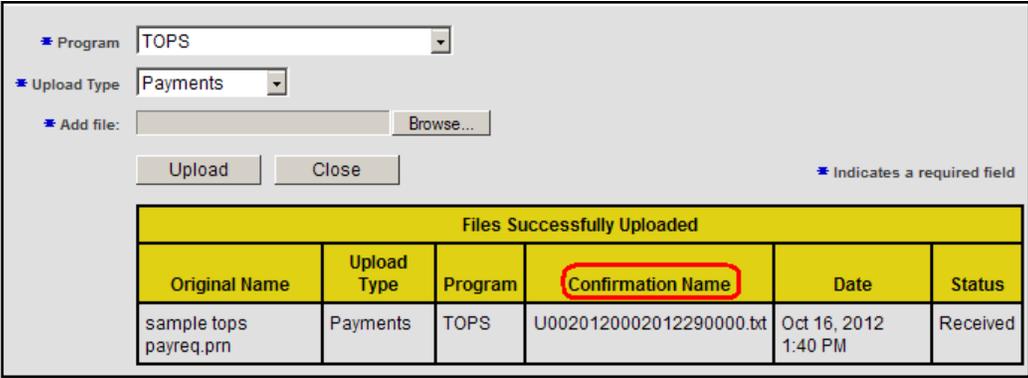
Note the .PRN extension.
PRN files are space-delimited text files, useful for exporting fixed-length data.



Now all the required fields are populated. If you changed your mind and wanted to cancel your upload, you would click the **Close** button, but for this demo you would click the **Upload** button:



The **Upload** button submits your file—after we have saved it on our server, you will receive a confirmation message similar to this one:

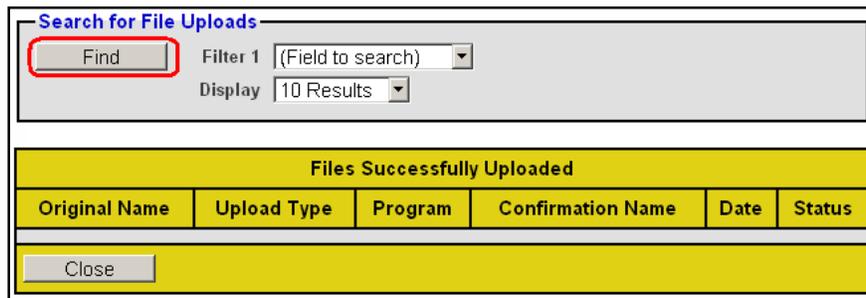


Saving a screen print, including the **Confirmation Name**, as shown above, allows you can see all the parameters you selected before you uploaded your file. If questions arise concerning your transmission, the screen print serves as a ready reference.

Now that you have submitted a file, you could change the parameters to upload another. For example, you could upload GO Grant payment batch file next. Once you are finished with your uploads, click the **Close** button to return to the menu selection. From there you could click the **Upload History** button. This is where you would find a log of all your uploaded files:



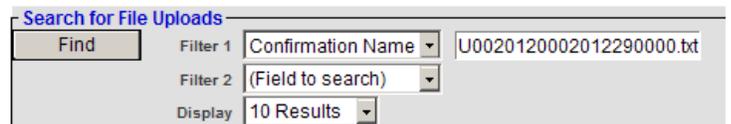
The **Upload History** button will show whatever files you have uploaded during your current session. However, if your session timed out or if you logged out for a break, you can use the **Find** button:



First, choose a filter. For example, you could search by “Confirmation Name”:



Choosing a filter will make a field appear where you can enter your search value—in this case, the Confirmation Name you were given for your test upload:



Next you would click the **Find** button to start the search. Compare the search sample below with your uploaded file from the bottom of the previous page. As you can see, the data matches:

Files Successfully Uploaded					
Original Name	Upload Type	Program	Confirmation Name	Date	Status
sample tops payreq.prn	Payments	TOPS	U0020120002012290000.txt	Oct 16, 2012 1:40 PM	Received

Close

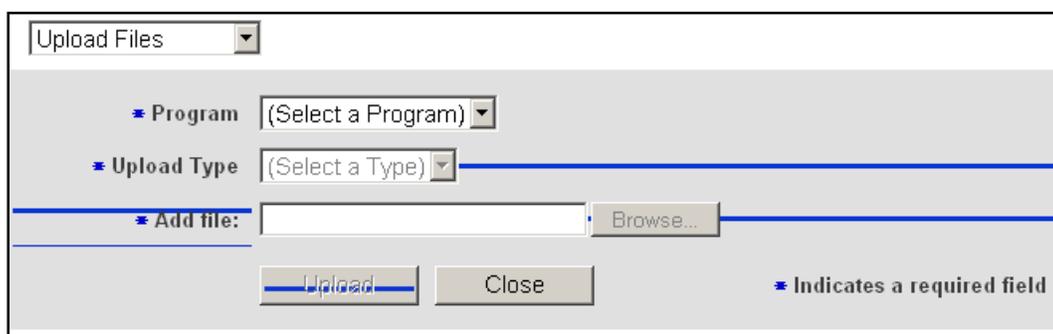
In summary, you upload payment request files and grade submission files through the **Upload Files** tab. Select the **Upload Files** function then select the **Program**. Next select the **Upload Type**—Payments or Grades—then click **Browse**. That will open a window for you to navigate to where your file is located. Double-click the file in question then click **Open** to make your file selection. Then click the **Upload** button to send your file. You can review your submitted files by selecting the **Upload History** function. Select a filter or filters and enter your search parameters, then click the **Find** button.

Appendix A. Questions & Answers

In this section we'll address some common questions that have popped up during the roll-out of the Award System.

Q: On some screens I see thin blue bars beside a field or over a button—what's up with that?

A: That means you're running version 6—or older—of Microsoft's Internet Explorer. We've tried to make the Award System compatible with a wide range of browsers, but there are some instances in which IE6 behaves differently than the rest. In the case of IE6, these blue bars indicate fields which are not available until something changes on the screen.



The screenshot shows a web form with the following elements:

- A dropdown menu labeled "Upload Files".
- A required field "Program" with a dropdown menu showing "(Select a Program)".
- A required field "Upload Type" with a dropdown menu showing "(Select a Type)".
- A required field "Add file:" with a text input box and a "Browse..." button.
- An "Upload" button.
- A "Close" button.
- A legend: "Indicates a required field".

Thin blue horizontal bars are overlaid on the "Upload Type" dropdown, the "Add file:" text input, and the "Upload" button, indicating they are unavailable in IE6 until a change occurs on the screen.

In the case of IE6, these blue bars indicate fields which are not available until something changes on the screen. It is the equivalent of a button being "grayed out." In the sample above, **Upload Type** is unavailable until **Program** is selected. **Add File** isn't available until **Upload Type** is selected; likewise, the **Upload** button isn't available until **Add File** has been entered.

Q: Sometimes I have to click a button twice to submit—and why can't I tab from field to field?

A: Again, that is another example of running the Award System through an older browser—particularly IE6. Newer browsers, such as Chrome, Firefox 3 or higher, and IE7 or higher, provide much smoother navigation through the Award System.

Q: Can I use my old Portal password in the Award System?

A: No, in the interests of security, we are making a clean break from the accounts in the Portal. Unlike the Portal, the Award System will allow multiple accounts per institution.

Q: I am the Financial Aid Director for my institution and I received your password letter, but the Information Technology department used to operate the TOPS Portal at my school—does this mean I am now responsible for operating the Award System?

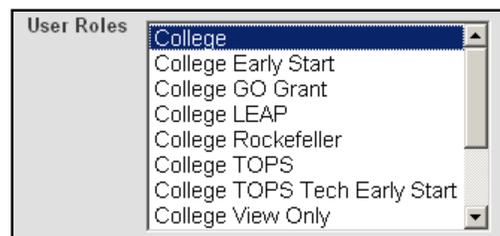
A: No. Per Dr. Bell’s email blast “TOPS Portal Changes URGENT” sent August 11th, 2010 @ 2:22 PM, you can choose a designee to serve as “custodian” of the Administrator Account password. Simply give the letter to your I.T. Department head so he or she can manage your institution’s Award System account. If you forward this letter through your institutions internal mail system, please be sure to send it confidentially.

Q: I work for a small office and I do everything on the TOPS Portal myself. Do I really have to create all those extra accounts to operate the Award System?

A: No. Creating “helper” accounts is an option. Each institution gets one Administrator Account which has the authority level to perform all Award System functions—making payment requests for any program in which your institution participates; submitting grades for your programs; downloading rosters; and so on.

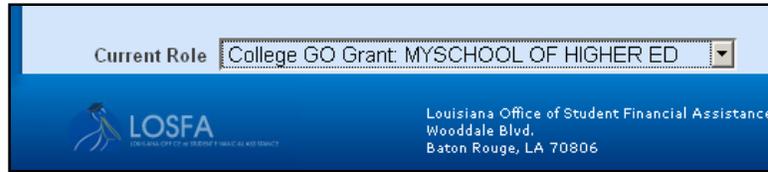
Q: We have several users in our Financial Aid office so allowing multiple accounts is going to be wonderful. But am I really going to have to assign a separate role for each program to all of my users?

A: No. Each user must have one role, but if your users are responsible for all LOSFA’s programs, assign your users the “College” role. This role has the authority to work with all LOSFA’s programs. We created that role specifically for such situations.



Q: My administrator gave me responsibility for the GO Grant program, the Early Start program, and the Rockefeller program, but all I see are GO Grant options when I view the tabs. Aren’t I supposed to see the other program options too?

A: Yes and No. We understand that some users “wear many hats” for their institutions. However, in keeping with that expression, you can only wear one hat at a time. Look at the bottom of your screen, in the left corner—you should see a label that says “Current Role.” Beside this will be a drop-down selector—in your case it will say “College GO Grant” followed by the name of your institution.



Use that drop-down to make another selection, then click the “Change Role” link that appears. Then when you visit the tabs you will see the functions related to your new role. This drop-down will always display your current role, so remember, the screens will display functions accordingly.

Q: I entered lots of payment requests on-line and discovered I made an error, but now I have so many records in the list I can't seem to find him. Is there a way to find my payment request?

A: Yes, just “filter” it. You don't have to scroll through the list so long as you have a field you can use in a search. Look near the **Find** button and click the drop-down beside “Filter 1.” Different functions have different key fields, but they all work the same way. Using the filters you could return records by payment request term, or by date, etc. In your case, since you're looking for a student, try SSN as a filter.



You would set the filter to “SSN” and enter the student's SSN in the box beside it, then click the **Find** button.



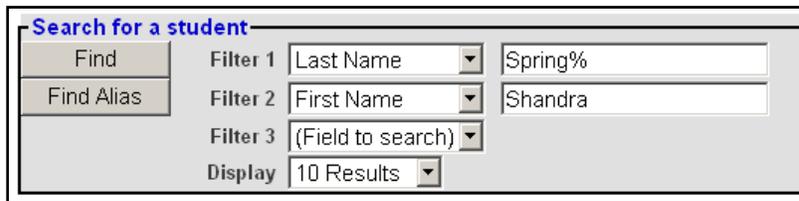
As you can see, the search will return your student. Next you would pick the record by checking it in the **Select** column, then you would either **Edit** or **Delete** it:

TOPS Payment Requests for UNIVERSITY OF LA-MONROE - (1) record(s) found.						
Select	SSN	Term	Standing	Process Date	Status	Verification Number
<input checked="" type="checkbox"/>	777555333	2S2010	00	8/20/2010	Pending	TO-1183
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Close"/>						

In this sample, note that you also could have used Verification Number to return your student.

Q: I'm looking for a student but I don't have her SSN and I can't exactly remember her name—Springfield, Springstein, Spring-something—how would I search for her?

A: Use a wildcard. Nearly every function has a **Find** button, and to the right of this you will see a place to select filters. In this case you would select “Last Name” as your filter. Then, in the entry field, type “Spring%”—the percent sign is your wildcard. This would return last names like Spring, Springer, Springfield, etc. You could navigate through results to find your student. However, if you had a second key to search by, such as her first name, you could narrow the search. Just set a second filter and enter her first name, then click **Find**:



The screenshot shows a search interface titled "Search for a student". It features a "Find" button and a "Find Alias" button. Below these are three filter options: "Filter 1" set to "Last Name" with the value "Spring%", "Filter 2" set to "First Name" with the value "Shandra", and "Filter 3" set to "(Field to search)". A "Display" dropdown is set to "10 Results".

Q: Every time I go to a certain function, it's always on the last screen I was looking at—I can't make it go away. What do I do?

A: The Award System was designed to “save your place” when you’re working in multiple functions—it prevents you from having to re-enter a search value a second time. So, if you had to leave one screen to look up something else on another, when you came back, the screen would remember where you were. However, if you are done with a function, click the **Close** button:

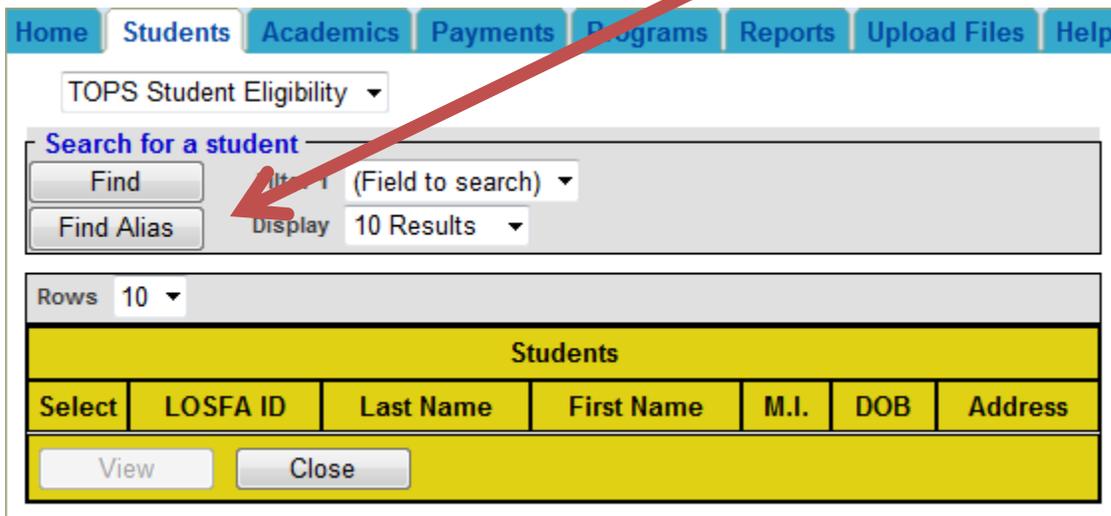


Award System User Guide – Find Alias

LOSFA is updating the Award System User Guide for Schools to reflect the numerous changes enacted in the latter half of 2014. However, one feature update, **Find Alias**, is important enough to merit documenting now.

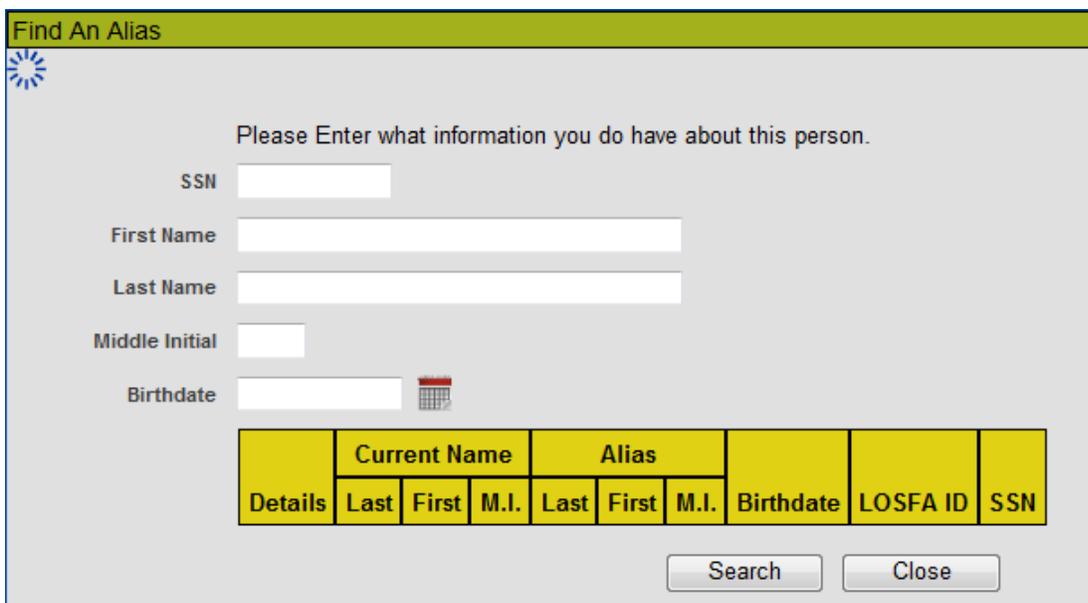
Users already familiar with **Find Alias** know it's useful for finding students who may have changed their names. However, under modifications rolled out December 4th, 2014, **Find Alias** now also features birthdate and Social Security Number.

Find Alias is already on a number of screens—just look for the "Find Alias" button, located beneath the "Find" button:



The screenshot shows the top navigation bar with tabs for Home, Students, Academics, Payments, Programs, Reports, Upload Files, and Help. Below the navigation bar is a dropdown menu for 'TOPS Student Eligibility'. The main content area is titled 'Search for a student' and contains a 'Find' button, a 'Find Alias' button, a search input field with a placeholder '(Field to search)', and a 'Display 10 Results' dropdown. A red arrow points from the 'Find Alias' button to the 'Find' button. Below the search area is a table with columns for Select, LOSFA ID, Last Name, First Name, M.I., DOB, and Address. The table is currently empty. At the bottom of the table are 'View' and 'Close' buttons.

Clicking that button will open this pop-up over whatever screen you were viewing:



The 'Find An Alias' pop-up window has a title bar with a refresh icon. The main content area contains the text 'Please Enter what information you do have about this person.' followed by input fields for SSN, First Name, Last Name, Middle Initial, and Birthdate (with a calendar icon). Below the input fields is a table with columns for Details, Current Name, Alias, Birthdate, LOSFA ID, and SSN. The table is currently empty. At the bottom of the pop-up are 'Search' and 'Close' buttons.

Details	Current Name			Alias			Birthdate	LOSFA ID	SSN
	Last	First	M.I.	Last	First	M.I.			

Award System User Guide – Find Alias

Fill in your search parameters then click the "Search" button:

SSN

First Name

Last Name

Middle Initial

Birthdate 

Details	Current Name			Alias			Birthdate	LOSFA ID	SSN
	Last	First	M.I.	Last	First	M.I.			

If no matches are found, the table section will say "No Aliases records found":

SSN

First Name

Last Name

Middle Initial

Birthdate 

Records found with the following parameters: JOHN DOE									
Details	Current Name			Alias			Birthdate	LOSFA ID	SSN
	Last	First	M.I.	Last	First	M.I.			
	No Aliases records found.								

Award System User Guide – Find Alias

If TOO many records are found, the function will limit the results to the first ten students:

SSN

First Name

Last Name

Middle Initial

Birthdate 

Previous 1-5 of 10 ▼ Next 5

Records found with the following parameters: JOHN GREEN									
Details	Current Name			Alias			Birthdate	LOSFA ID	SSN
	Last	First	M.I.	Last	First	M.I.			
▶ Show	GREEN	JOHN	B	GREEN	JOHN	B			
▶ Show	GREEN	JOHN	P	GREEN	JOHN	P			
▶ Show	GREEN IV	JOHN	E	GREEN	JOHN	E			
▶ Show	GREEN	JOHN	R	GREEN	JOHN	R			
▶ Show	GREEN	JOHN	L	GREEN	JOHN	L			

If your record is not among those first ten students, use additional parameters such as Middle Initial, Birthdate, or SSN to narrow the results:

Please Enter what information you do have about this person.

SSN

First Name

Last Name

Middle Initial

Birthdate 

Previous 1-5 of 10 ▼ Next 5

Records found with the following parameters: JOHN A GREEN									
Details	Current Name			Alias			Birthdate	LOSFA ID	SSN
	Last	First	M.I.	Last	First	M.I.			
▶ Show	GREEN	JOHN	A	GREEN	JOHN	A			

Additional information about your student is available by clicking "Show"....

Award System User Guide – Find Alias

...which will include most recent address and all known names:

Records found with the following parameters: JOHN A GREEN									
Details	Current Name			Alias			Birthdate	LOSFA ID	SSN
	Last	First	M.I.	Last	First	M.I.			
Hide	GREEN	JOHN	A	GREEN	JOHN	A			
Address		All Known Names				• GREEN , JOHN A			
City									
State									
ZIP Code									

As with all the text input fields in the Award System, wildcards can be used if the exact spelling is unknown—that wildcard is the percent sign (%):

SSN

First Name

Last Name

Middle Initial

Birthdate 

Previous 1-5 of 10 ▼ Next 5

Records found with the following parameters: SPRING%									
Details	Current Name			Alias			Birthdate	LOSFA ID	SSN
	Last	First	M.I.	Last	First	M.I.			
Show	SPRINGER	PAULA		Springer	Paula				
Show	SPRINGSTEAD	DAKOTAH		Springstead	Dakotah				
Show	SPRING	CARLY	E	SPRING	CARLY	E			
Show	SPRING	CHERI	M	SPRING	CHERI	M			
Show	SPRING	ANDREW	J	SPRING	ANDREW	J			

In the example above, "Spring%" has returned Spring, Springer, and Springstead.

Award System User Guide – Find Alias

When done, simply close the popup with either the "Close" button or the "X" in the upper-right:

The screenshot shows a web-based popup window titled "Find An Alias". The window has a light gray background and a yellow header bar. The text "Please Enter what information you do have about this person." is centered at the top. Below this text are several input fields: "SSN" (a small text box), "First Name" (a long text box), "Last Name" (a long text box), "Middle Initial" (a small text box), and "Birthdate" (a text box with a calendar icon). At the bottom of the form is a table with columns for "Current Name", "Alias", "Birthdate", "SFA ID", and "SSN". The "Current Name" and "Alias" columns are further divided into "Last", "First", and "M.I." sub-columns. Below the table are two buttons: "Search" and "Close". A red arrow points from the "Close" button to the "X" in the top-right corner of the window's title bar.

Details	Current Name			Alias			Birthdate	SFA ID	SSN
	Last	First	M.I.	Last	First	M.I.			