Graduate School Tracking Program (GSTP)

Presented by: Stephanie Nielsen, Associate Director, Accounting
What is the GSTP system and Why do I need it?

- The GSTP system is used to track and manage graduate student support by college, department, and student.
- This system allows us to see what and how much funding has been given to a specific graduate student.
- It helps determine how much funding is needed for each fiscal year and award type by college, department, and cohort of student.
- It allows for departments to request that a student award be deferred for various reasons and helps with the petition process.
- It also allows for better reporting on the types, numbers, and award amounts that are given out to our graduate students on an annual basis.
Important Information

• You must have GIMS access in order to enter the new GSTP system
  • This can be requested by a current GIMS user in your college.
  • Current users can be found by following the link
    http://graduateschool.ufl.edu/faculty--staff/resources/graduate-contacts/
  • Instructions on how to request access were attached to the email notification that
    was sent out to all users with current GSTP access.

• You must have completed FERPA Basic training PRV802 on an annual
  basis to gain and maintain access to the GSTP system.

• Go Live Tentative Date August 8, 2016
  • Please log off of GSTP on August 5, 2016 at 3:00 o’clock to allow for migration of
    data from the old system into the new system.
  • Updates will be sent to the listserv if any changes to these dates and times are
    needed.
Accessing GIMS

- GIMS can be accessed one of two ways
  - http://gradschool.ufl.edu/gimsportal/gatorlink/portal.asp
  - myUFL Main Menu > Quick Links > GIMS
GSTP Navigation

• The Navigation is along the left hand side of the screen
College Level Users: Distributing Awards to Departments

• College level users will need to distribute the Annual Award Amounts down to their departments.
  • Click on the Distribute Awards Option along the left hand menu
  • Choose the correct Fiscal Year
  • Click the Generate Distribution List Button
College Level Users: Distributing Awards to Departments Continued

• Add the total dollar amount for the fiscal year given to each department in the Amount Disbursed Cells and click Save Award Distribution.
• Only the total Available Amount can be distributed.
• All departments can be added at one time before saving or they can be done one at a time.
• If you would like to add notes to an individual department you will need to add the dollar amount, the note, and then click the Save Award Distribution button. The note will be added to the individual line only.
• The Remaining Amount will automatically be updated after you have clicked out of each cell.
College Level Users: Distributing Awards to Departments Continued

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Department Level Users: Distributing Awards to Students

• Department level users will need to distribute the Annual Award Amounts down to their Students.
  • Click on the Student Awards Option along the left hand menu
  • Choose the Type of Award and Fiscal Year for which you would like to distribute Awards
• Type or Copy and Paste a UFID or multiple UFIDS into the UFID box and then click the Generate Student List.
  • The system will automatically check to see if the UFID of the student(s) is eligible to receive the type of award chosen and will only pull back eligible students.
Department Level Users: Distributing Awards to Students Continued
Department Level Users: Distributing Awards to Students Continued

• For the previous example three UFID’s were input only two were pulled back. There were only two UFID’s that were eligible to receive the award chosen.

• Also notice that there are two different College’s and Departments.
  • At this time the system will pull back any student / UFID that is eligible to receive the award it does not matter what college or department.
  • It is very important that you review and make sure only the student you are intending to give an award to has been pulled up.
• Once you have the correct students you can make awards one of two ways.
  • You can do each student individually by selecting the Appointment Type, First Term Student is to receive the Award, What terms the student should receive funding, the Annual Amount, and finally the number of Years the student is eligible to receive the award.
  • Once you have completed the student you will click the Confirm Student Award Button.
Department Level Users: Distributing Awards to Students Continued

- Notice that the amounts automatically adjust as you update the data.
• The second way that you can add student awards is to do multiple awards at once.
  • You will notice that there are check boxes in front of each student. You can check all students and use the options in the header row to assign all students the same First Term Student to Receive Award, The terms the student should receive the award, the annual amount, and the years.
  • The only data you will manually have to update is the Appointment type for each student.
  • You can use as many or as few of the header fields as you like.
  • You can also manually change an individual student after the fact by unchecking all boxes and just going to the one students line to make individual adjustments.
  • Always click the Confirm Student Award when finished.
Department Level Users: Distributing Awards to Students Continued
Department Level Users: Distributing Awards to Students Continued

- After clicking the Confirm Student Award Button you will get a pop up screen confirming that you want to save the Student Award Assignment.
Department Level Users: Distributing Awards to Students Continued

• Once you have saved. Your screen will change and show you the Awarded Student List for each session. If you step away and come back later in the day and have not logged out of GIMS you will be able to see what you had previously done. However, if you log out the Awarded Student List will only re-appear with updated data after you click the Confirm Student Award button.
College Level Users: Summary Menu

• The Summary Menu will show the summary of awards.
• You can search by Type of Award and Fiscal Year.
• Don’t forget to click the Generate Summary Button.
College Level Users: Summary Menu Continued

- The # of Awards column shows the number of award per Department for the current fiscal year.
- The Award Used Column shows the amount of the award used for the current fiscal year.
College Level Users: Summary Menu Continued

- By clicking on a Department Name you can drill down to get more detailed information by Department.
College and Department Level Users: Summary Menu

• The department level summary is the same screen for both the college and departments.
• The data will be sorted by the most current cohort of students at the top with the total for the fiscal year summed at the bottom.
• By clicking on the students UFID you can drill down to see the detailed information for the student’s award.
Department Level Users: Student Deferment Requests

• To request a deferment you will want to be in the Summary Menu and drilled down to the specific student for which you would like to request a deferment.

• You will then click the Deferred button at the top of the screen.
Department Level Users:
Student Deferment Requests Continued

• Once you click the Deferred button the lower screen will update so that you can select the terms that you would like to defer. You only need to select the beginning term and the ending term and then click Save Deferred List button.
Department Level Users: Student Deferment Requests Continued

- A new screen will open. Here you will need to select the Reason for Deferment and type any notes and justification into the text box.
- You will also need to email GraduateSchoolPetitions@aa.ufl.edu the signed memo and backup documentation.
- Finally Click the Create button.
Department Level Users:
Student Deferment Requests Department Approval

• Once the deferment has been input the department level approver will need to go into the GSTP system and approve the deferment so that it will move on to the College level approver.

• On the left hand navigation you will click Deferments.

• The College and Department will automatically be selected. You will need to choose the Reason at very least and click the Generate Deferment List button. You may also choose the start/end Terms and the Status options to narrow the search.
Department Level Users: Student Deferment Requests Department Approval Continued

- Once the list of deferments has been generated you will click on the View/Edit link.
A new screen will open that shows the approval status. Please use the drop down menu to select Approved, Denied, Unknown, Recycled add any notes you wish and click the Submit button.

The deferment request is sent to the College for approval.
College Level Users: Deferments Menu

• Using the left hand navigation menu click on the Deferments Option. This will allow you to go in and look at any outstanding deferment that you may have to approve.

• It is best to filter by the Reason at very least for each of the three Reasons (Medical Withdrawal, Internship, or Other Award)

• You may filter by other options such as Department, Start Term, End Term, and Status.

• You will have to click the Generate Deferment List Button to update your view.
Once the list populates you will want to click on the View/Edit of the student to go into the deferment.
College Level Users: Deferments Menu Continued

• A new screen will open that shows the approval status. Please use the drop down menu to select Approved, Denied, Unknown, Recycled add any notes you wish and click the Submit button.

• The deferment will be sent to the Graduate School for review and final approval.
More improvements and functionality to come.

- Reports will be built out and available within the Reports Menu Option
- Ability to upload memos and justifications within the GSTP System will be available which will remove the need to send petition email requests to GraduateSchoolPetitions@aa.ufl.edu
- Anyone interested in doing some initial testing over the next week please send me an email and I will get with you to make sure you have all security and access in the new system.
Questions and Comments

Thank you for attending todays workshop.
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