# eGradFel User Manual

*eGradFel.msu.edu*

Office of Financial Aid
Student Services Building
556 E. Circle Drive, Room 252
East Lansing, MI 48824

Updated 2/24/2023

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# Access

In order to give an employee access to eGradFel to **create** and **view** fellowships, their supervisor must email the Office of Financial Aid with the employee's MSU Net ID and name to the ES.DL.OFA.GradFellowship email group.

Contact people are:

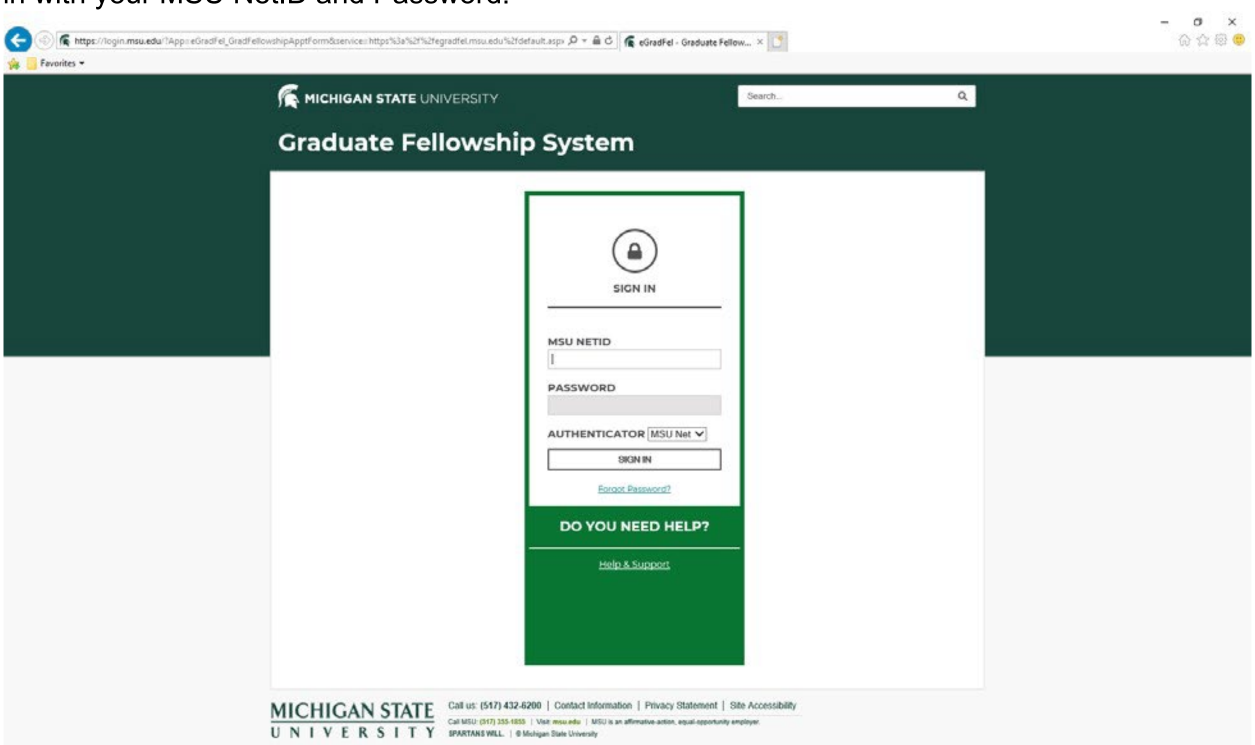
Cheryl Whitman 353-5991
whitman@msu.edu

John Garcia 432-6425
garcia11@msu.edu

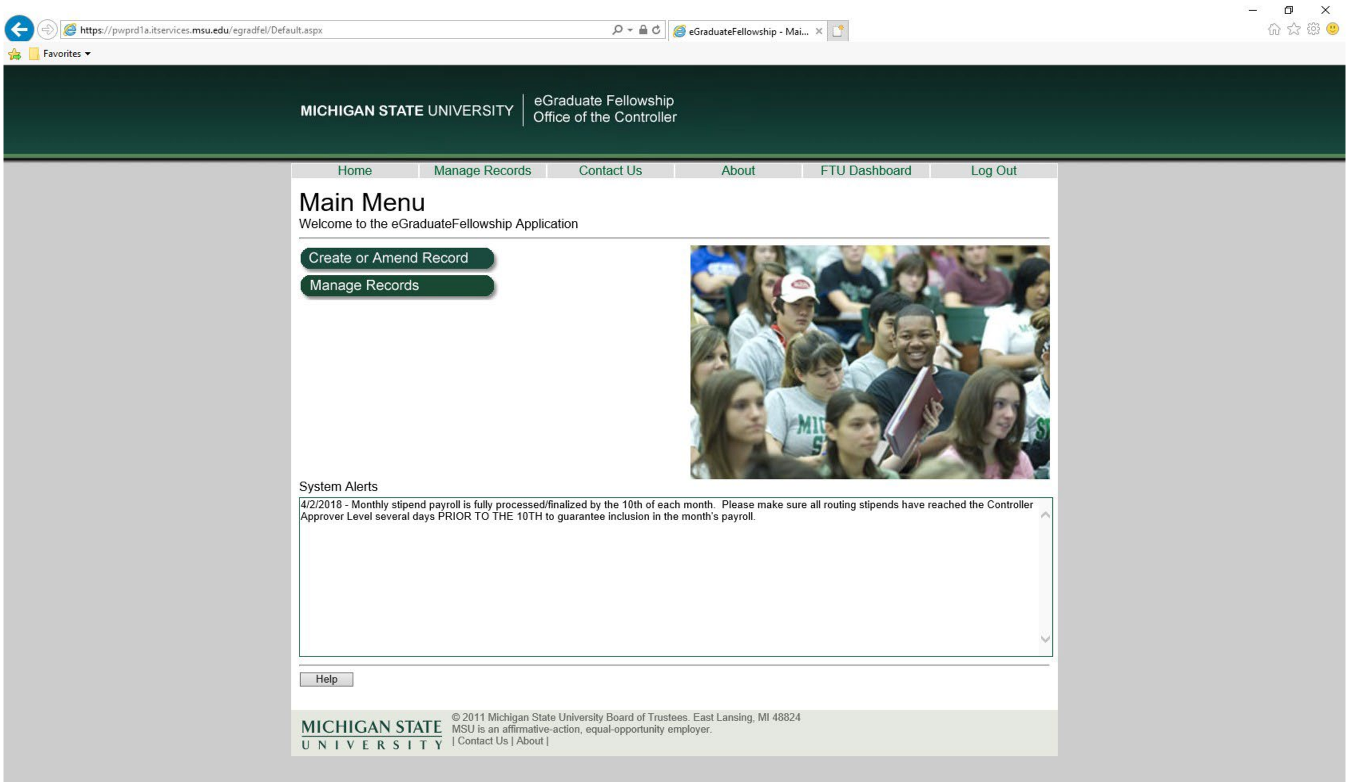
To make an employee an **approver** of fellowships in eGradFel, their supervisor must fill out the form at the eARM, found here:
https://aissecuritycontact.ais.msu.edu/ARMs/eGradFelApprover.pdf

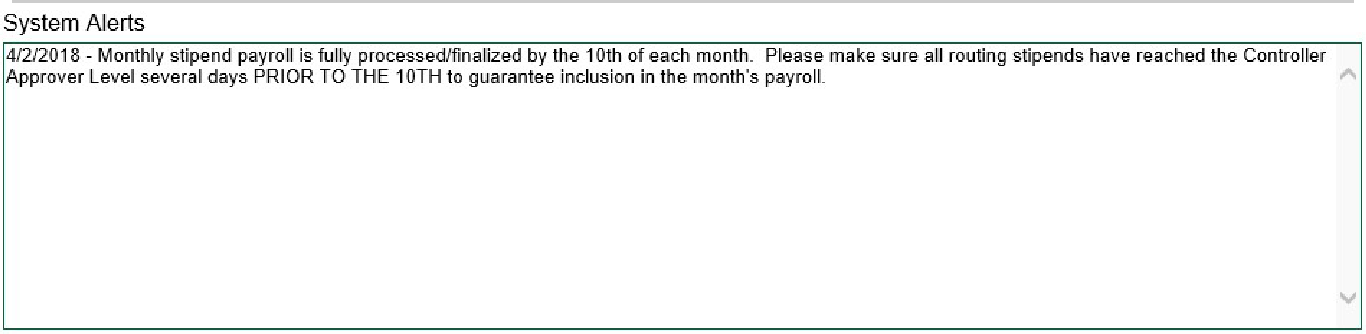
# Logging In

Once you have access to eGradFel, you can access the website at eGradFel.msu.edu and log in with your MSU NetID and Password.




After logging in, you will be taken to the Main Menu of eGradFel. *It is very important to pay attention to any System Alerts that are posted.*

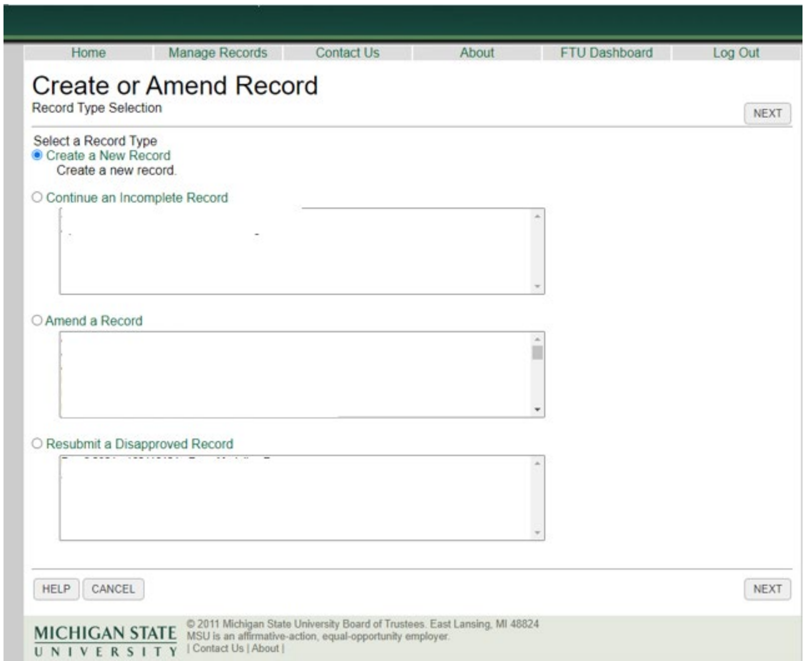



# Creating an Award

To initiate a fellowship, click on the Create or Amend Record button on the Main Menu. Next you are given the option to Create a New Record, Continue an Incomplete Record, Amend a Record, or Resubmit a Disapproved Record. Select Create a New Record, then click Next.

Please note that if you are creating **20 or more** awards then please send an email to ES.DL.OFA.GradFellowship@esp.msu.edu so the Office of Financial Aid has some notice.

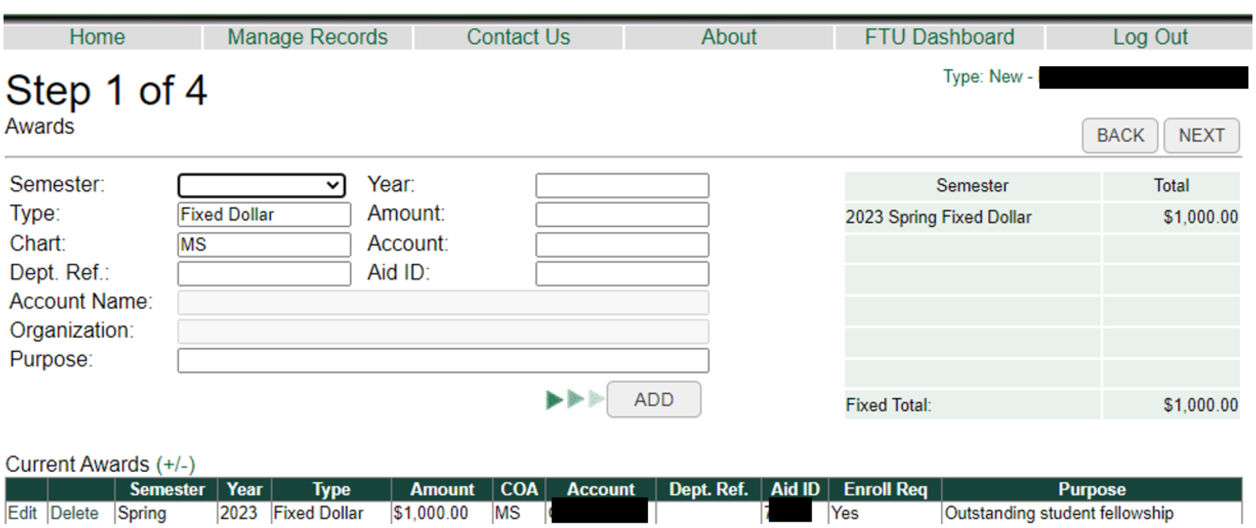



Once you enter a student's PID or EmplID (EmplID is preferred) , the remaining fields will auto-populate with the Name, Citizenship, Tuition Residency, College, and Department.

In Step 1, you will enter the Award(s) that you are giving a student. Start by selecting the Semester and entering the Year when the award is being given. Next, select the Type of award.

Once you enter the Account, the Name and Organization are completed. You are also required to enter a Purpose. Please note that the Purpose is not added to the student's bill or student account. Once you have entered the award(s) you want to give, click Next.

*Note: If you are using GOF funds, enter your college's Aid ID , otherwise Aid ID can be left blank. In addition the Aid ID is the same as Fund Code. If you do not know the Aid ID/Fund Code then the Office of Financial Aid will either use the Account Crosswalk tool to find it, or create one.* ***It could be several days before the Fund Code can be used and the award added to the student's financial aid package.***

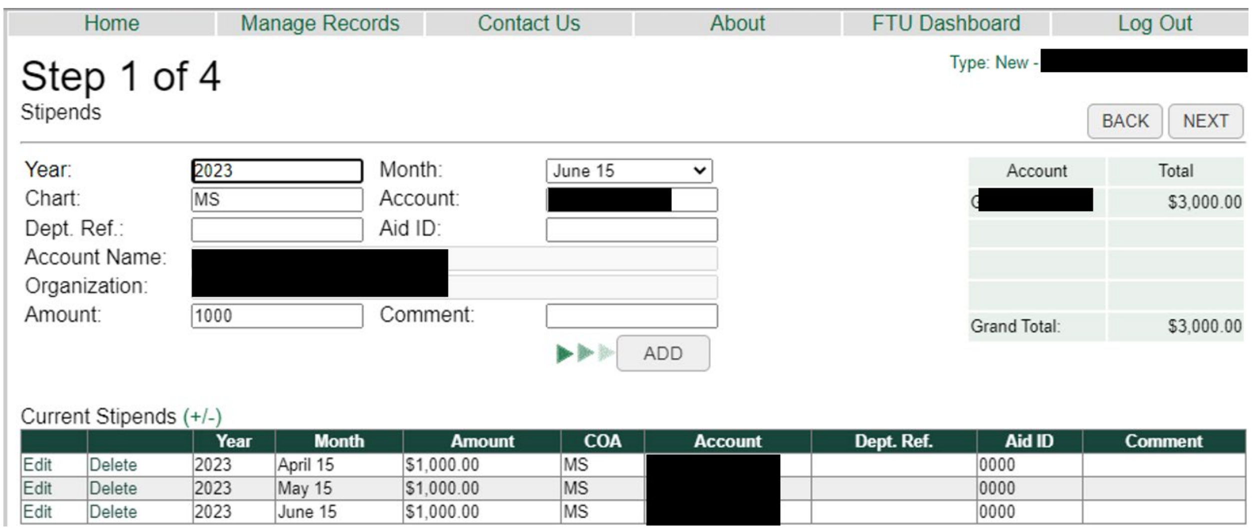


# Creating a Monthly Stipend

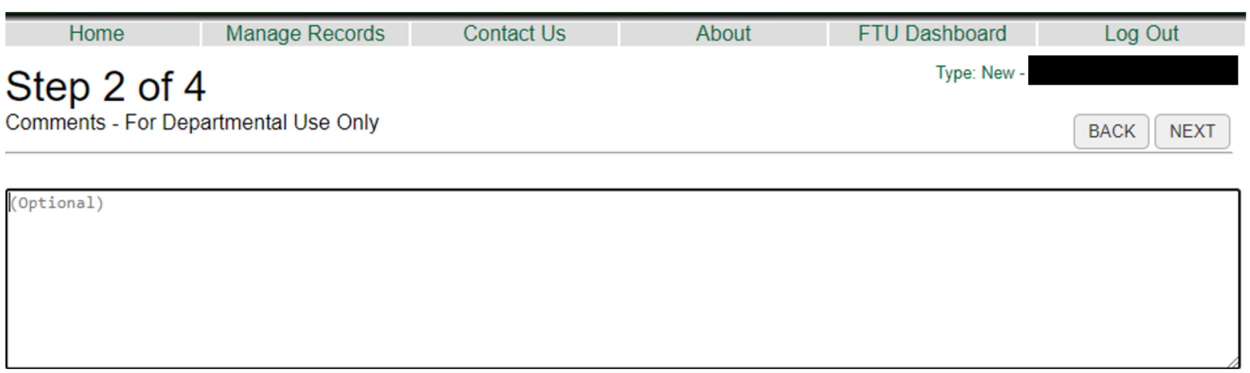
On Step 1, you can add Monthly Stipends.

Start by entering the calendar year when the stipend will be paid, then select the first month you want to pay the student. Enter the account number you want to pay the student from, and the amount you want to pay them. Then click Add.

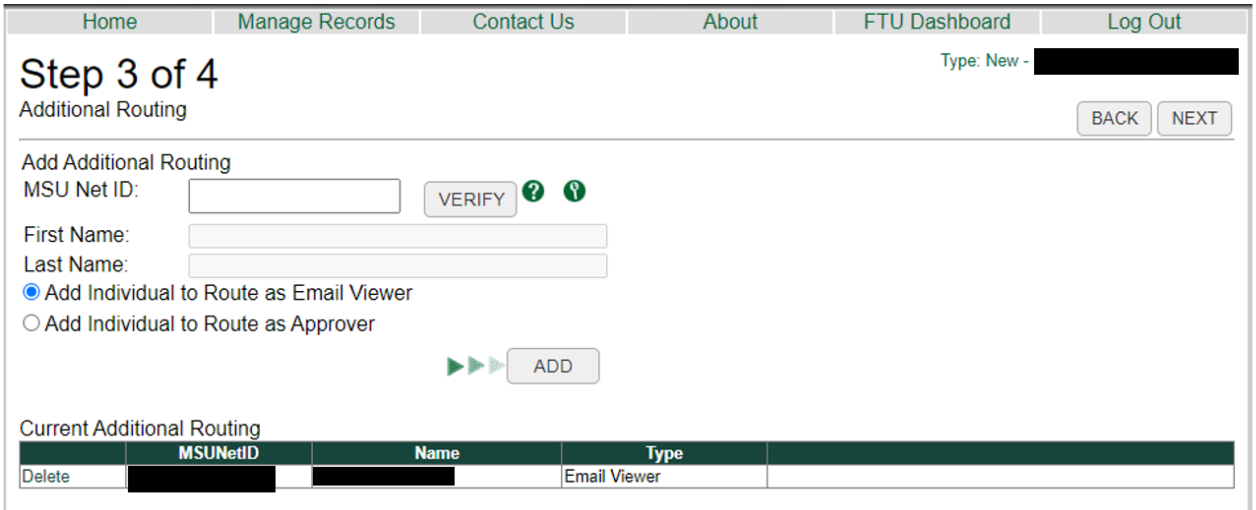
*Note: Stipend payday is always on the 15$^{th}$ of the month (unless the date is a holiday or weekend).*




Once you click Add, your first stipend will show under Current Stipends, and you can enter the next month you want to pay the student. Add comments ("For departmental use only")




Ensure you add routing for others who may need to review or approve the slip. After you have entered every month to pay the student, and confirmed that everything looks correct, you can click Next.



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Type: New - [redacted]

## Step 3 of 4

Additional Routing

BACK NEXT

Add Additional Routing

MSU Net ID: VERIFY

First Name:

Last Name:

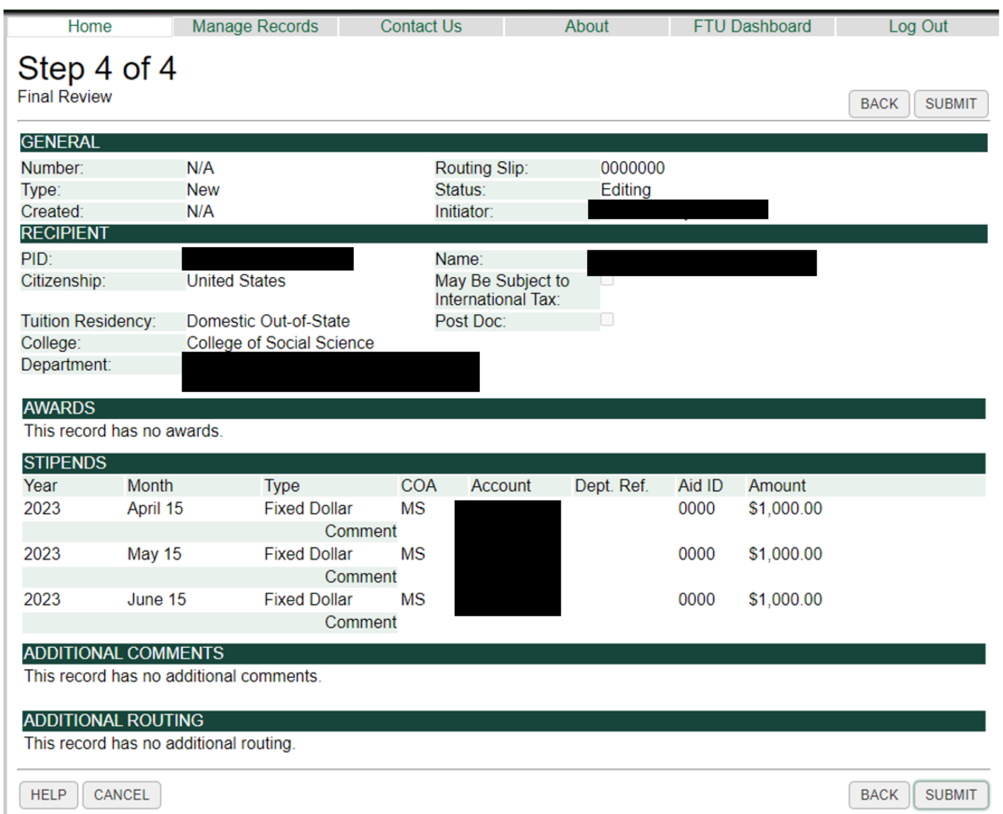
- (●) Add Individual to Route as Email Viewer
- ( ) Add Individual to Route as Approver

ADD

Current Additional Routing

| | MSUNetID | Name | Type | |
|---|---|---|---|---|
| Delete | [redacted] | [redacted] | Email Viewer | |

Final review:



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## Step 4 of 4

Final Review

BACK SUBMIT

**GENERAL**

| | | | |
|---|---|---|---|
| Number: | N/A | Routing Slip: | 0000000 |
| Type: | New | Status: | Editing |
| Created: | N/A | Initiator: | [redacted] |

**RECIPIENT**

| | | | |
|---|---|---|---|
| PID: | [redacted] | Name: | [redacted] |
| Citizenship: | United States | May Be Subject to International Tax: | ☐ |
| Tuition Residency: | Domestic Out-of-State | Post Doc: | ☐ |
| College: | College of Social Science | | |
| Department: | [redacted] | | |

**AWARDS**

This record has no awards.

**STIPENDS**

| Year | Month | Type | COA | Account | Dept. Ref. | Aid ID | Amount |
|---|---|---|---|---|---|---|---|
| 2023 | April 15 | Fixed Dollar | MS | [redacted] | | 0000 | $1,000.00 |
| | | Comment | | | | | |
| 2023 | May 15 | Fixed Dollar | MS | | | 0000 | $1,000.00 |
| | | Comment | | | | | |
| 2023 | June 15 | Fixed Dollar | MS | | | 0000 | $1,000.00 |
| | | Comment | | | | | |

**ADDITIONAL COMMENTS**

This record has no additional comments.

**ADDITIONAL ROUTING**

This record has no additional routing.

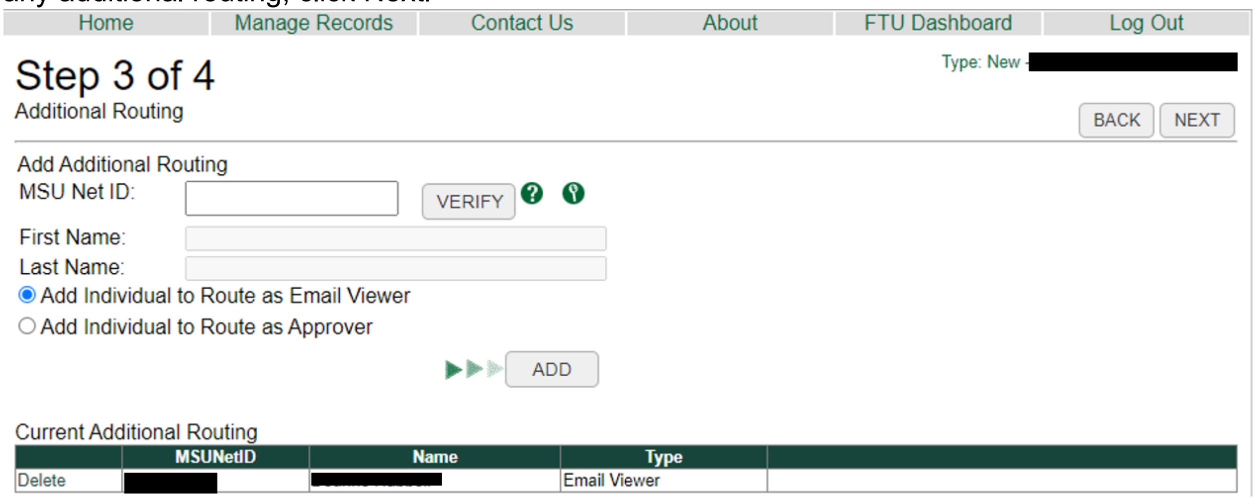
HELP CANCEL BACK SUBMIT

# Completing a Fellowship Form

In Step 2, you can enter any special instructions for the Department, or you can select Next to go to the next page. Departments should provide details about the award such as whether it is an increase of a prior award, a replacement for a prior award, or a cancellation of a prior award.

In addition, if the student has multiple enrollment levels it is important for departments to specify under which program the award is being given.

On Step 3, you can enter any additional people that you would like to approve the form, or to be notified when the form has been initiated. An Email Viewer will receive a copy of the form emailed to them. An Approver can also be added here if you would like more routing than the existing levels of approval. Once you enter a Net ID and click Verify, the name will populate so you can ensure that you are adding the correct user before clicking Add. Once you have added any additional routing, click Next.



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Type: New [redacted]

Step 3 of 4

Additional Routing

BACK NEXT

Add Additional Routing

MSU Net ID: VERIFY

First Name:

Last Name:

Add Individual to Route as Email Viewer

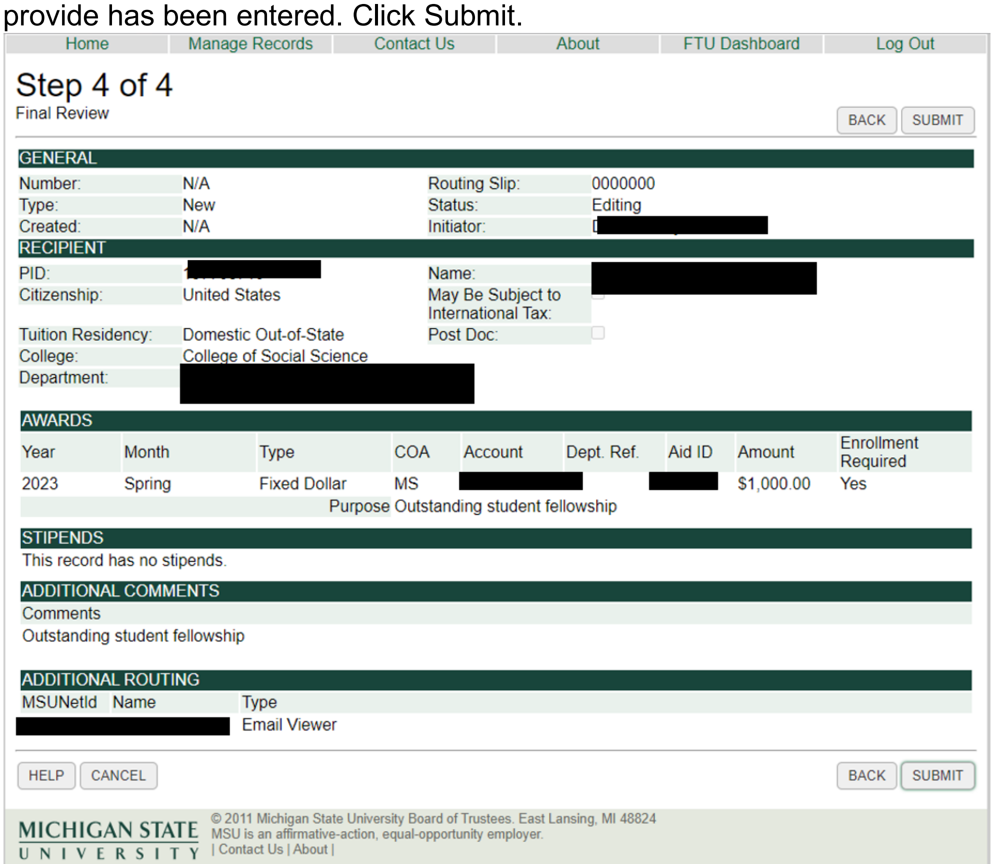
Add Individual to Route as Approver

ADD

Current Additional Routing

| | MSUNetID | Name | Type | |
|---|---|---|---|---|
| Delete | [redacted] | [redacted] | Email Viewer | |

Step 4 is the Final Review. Review the form and ensure all of the information you wish to provide has been entered. Click Submit.



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Step 4 of 4

Final Review

BACK SUBMIT

GENERAL

| | | | |
|---|---|---|---|
| Number: | N/A | Routing Slip: | 0000000 |
| Type: | New | Status: | Editing |
| Created: | N/A | Initiator: | [redacted] |

RECIPIENT

| | | | |
|---|---|---|---|
| PID: | [redacted] | Name: | [redacted] |
| Citizenship: | United States | May Be Subject to International Tax: | |
| Tuition Residency: | Domestic Out-of-State | Post Doc: | |
| College: | College of Social Science | | |
| Department: | [redacted] | | |

AWARDS

| Year | Month | Type | COA | Account | Dept. Ref. | Aid ID | Amount | Enrollment Required |
|---|---|---|---|---|---|---|---|---|
| 2023 | Spring | Fixed Dollar | MS | [redacted] | | [redacted] | $1,000.00 | Yes |

Purpose Outstanding student fellowship

STIPENDS

This record has no stipends.

ADDITIONAL COMMENTS

Comments

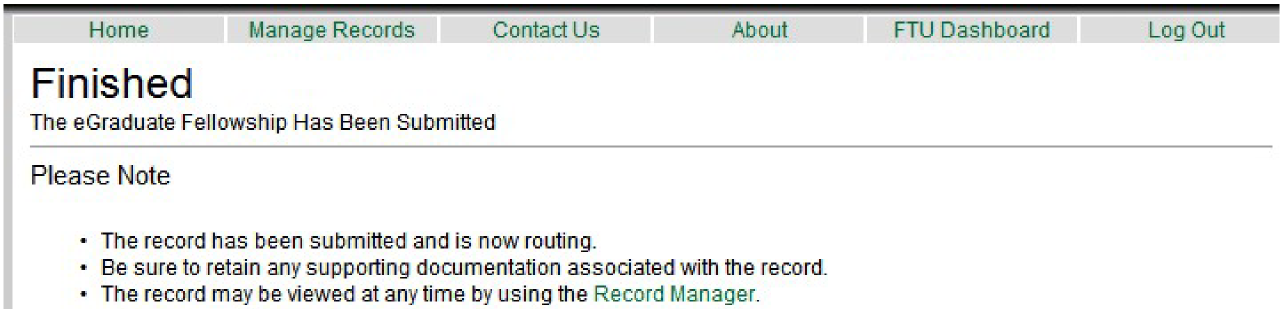
Outstanding student fellowship

ADDITIONAL ROUTING

| MSUNetId | Name | Type |
|---|---|---|
| [redacted] | | Email Viewer |

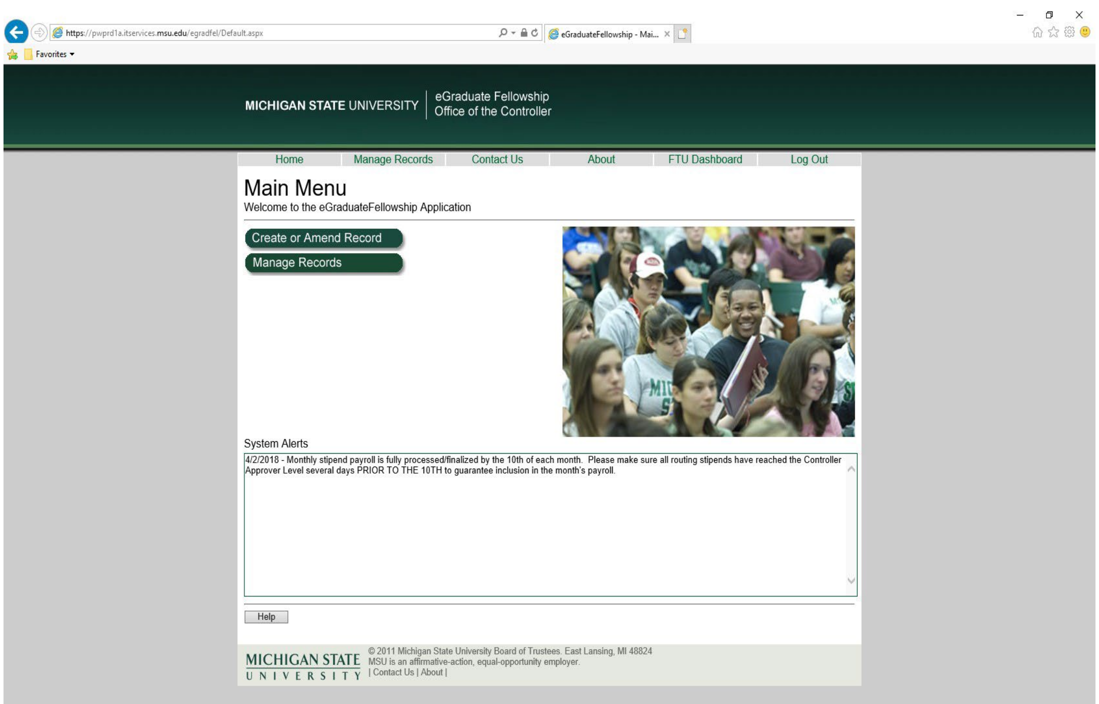
HELP CANCEL BACK SUBMIT

MICHIGAN STATE UNIVERSITY




# Amending a Fellowship

If you decide to make a change after a fellowship form has been fully approved, the form must be Amended. If you have completed the form within the last month, it will show up when you click on the Create or Amend Record button on the Main Menu. If you do not find it there, click on Manage Records on the Main Menu.




From the Record Manager page, you can search for the form that you need to amend. Change the Search Type and Start Date, as needed, and enter your Search Text.

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# Record Manager

View Previously Created Records

Search Criteria

| | | | |
|---|---|---|---|
| Search Type: | Routing Slip ID | Search Text: | 487442 |
| Record Status: | All | | |
| Start Date: | 6/19/2011 | End Date: | 6/18/2018 |

SEARCH

Search Results

Once your find the record that you wanted, click on Amend.

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# Step 1 of 5

Awards

Type: Amend [redacted]

BACK NEXT

| | | | |
|---|---|---|---|
| Semester: | | Year: | |
| Type: | Fixed Dollar | Amount: | |
| Chart: | MS | Account: | |
| Dept. Ref.: | | Aid ID: | |
| Account Name: | | | |
| Organization: | | | |
| Purpose: | | | |

ADD

| Semester | Total |
|---|---|
| 2022 Fall Fixed Dollar | $11,250.00 |
| 2023 Spring Fixed Dollar | $11,250.00 |
| Fixed Total: | $22,500.00 |

Original Awards (+/-)

| Semester | Year | AwardType | Amount | COA | Account | Dept. Ref. | Aid ID | Cr Min | Cr Max | Purpose |
|---|---|---|---|---|---|---|---|---|---|---|
| Fall | 2022 | Fixed Dollar | $11,250.00 | MS | [redacted] | | [redacted] | 1 | 99 | [redacted] |
| Spring | 2023 | Fixed Dollar | $11,250.00 | MS | [redacted] | | [redacted] | 1 | 99 | [redacted] |

Current Awards (+/-)

| | Semester | Year | Type | Amount | COA | Account | Dept. Ref. | Aid ID | Enroll Req | Purpose |
|---|---|---|---|---|---|---|---|---|---|---|
| Edit | Fall | 2022 | Fixed Dollar | $11,250.00 | MS | [redacted] | | [redacted] | Yes | [redacted] |
| Edit | Spring | 2023 | Fixed Dollar | $11,250.00 | MS | [redacted] | | [redacted] | Yes | [redacted] |

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# Step 2 of 5

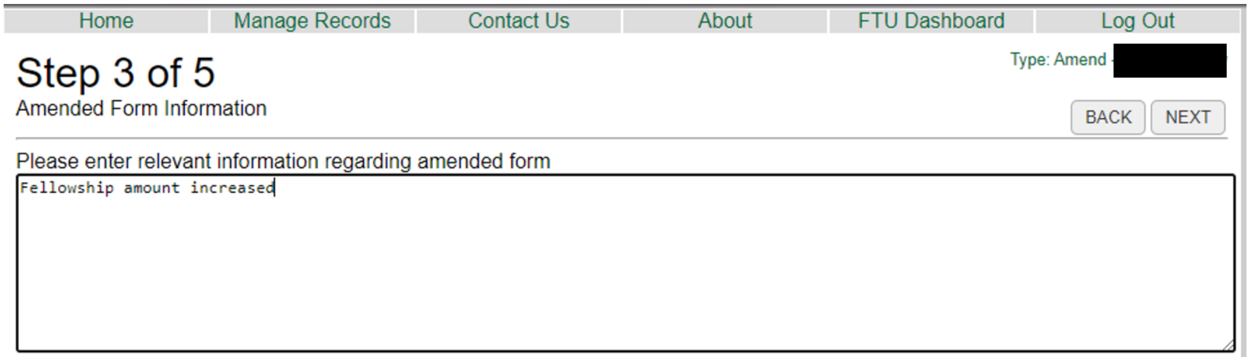
Comments - For Departmental Use Only

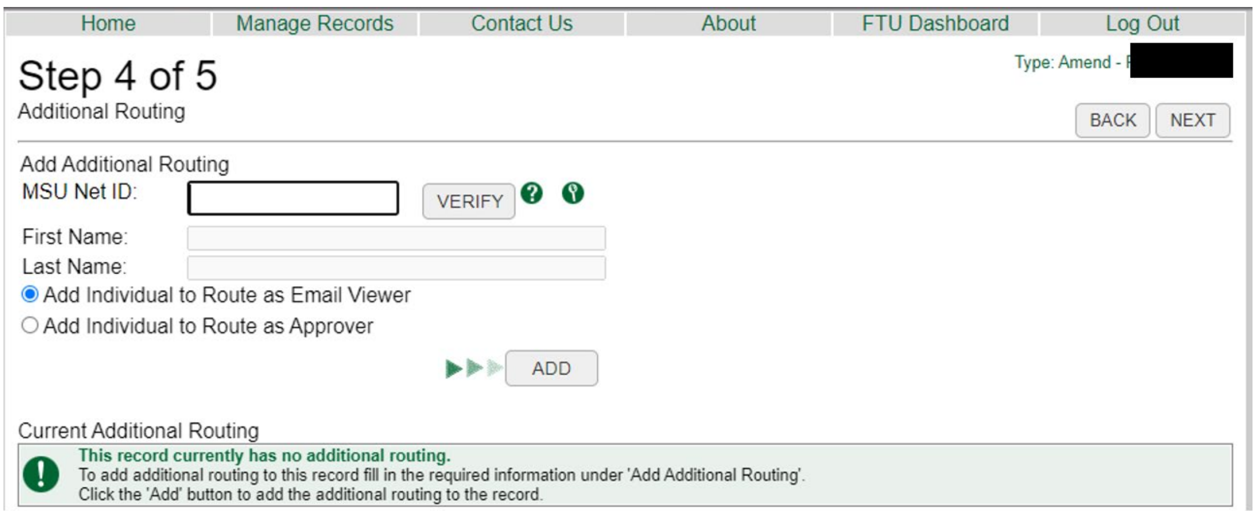
Type: Amend - [redacted]

BACK NEXT

(Optional)

Under Current Awards, click Edit to make changes. After making changes, you will be required to enter a purpose, such as “Increased Award” before clicking Update.



Final review.

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## Step 5 of 5

Final Review

BACK SUBMIT

**GENERAL**

| | | | |
|---|---|---|---|
| Number: | N/A | Routing Slip: | 0000000 |
| Type: | Amend | Status: | [redacted] |
| Created: | N/A | Initiator: | [redacted] |

**RECIPIENT**

| | | | |
|---|---|---|---|
| PID: | [redacted] | Name: | [redacted] |
| Citizenship: | United States | May Be Subject to International Tax: | |
| Tuition Residency: | In-State | Post Doc: | |
| College: | [redacted] | | |
| Department: | [redacted] | | |

**AWARDS**

| Year | Month | Type | COA | Account | Dept. Ref. | Aid ID | Amount | Enrollment Required |
|---|---|---|---|---|---|---|---|---|
| 2022 | Fall | Fixed Dollar | MS | [redacted] | | [redacted] | $11,250.00 | Yes |
| | | Purpose | [redacted] | | | | | |
| 2023 | Spring | Fixed Dollar | [redacted] | [redacted] | | [redacted] | $11,250.00 | Yes |
| | | Purpose | [redacted] | | | | | |

**STIPENDS**

This record has no stipends.

**ADDITIONAL COMMENTS**

This record has no additional comments.

**AMENDED COMMENTS**

Instructions

Fellowship amount increased

**ADDITIONAL ROUTING**

This record has no additional routing.

HELP CANCEL BACK SUBMIT

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Once you have made your changes, be sure to make a note of the changes that were made in Step 1. When the changes are verified as correct, submit the amended form.

**Notes on Submitting a New Slip After an Award Is Approved:**

If you are unable to amend a slip and are submitting a new slip then please ensure you provide specific directions for the Office of Financial Aid. For example, if an award is being moved from one account to another then please list the prior award and account number on the new slip with an amount of “0”, as well as the new account number.

# Cancelling a Fellowship

Once a fellowship form has been submitted and not yet approved, it can be cancelled by clicking the Cancel button in Records Manager any time before it is approved. If the fellowship is not approved (status says Routing) just click Cancel, and the fellowship will be canceled. (A pop up will come up and ask if you want to cancel the fellowship. Click okay and the fellowship will be canceled.)

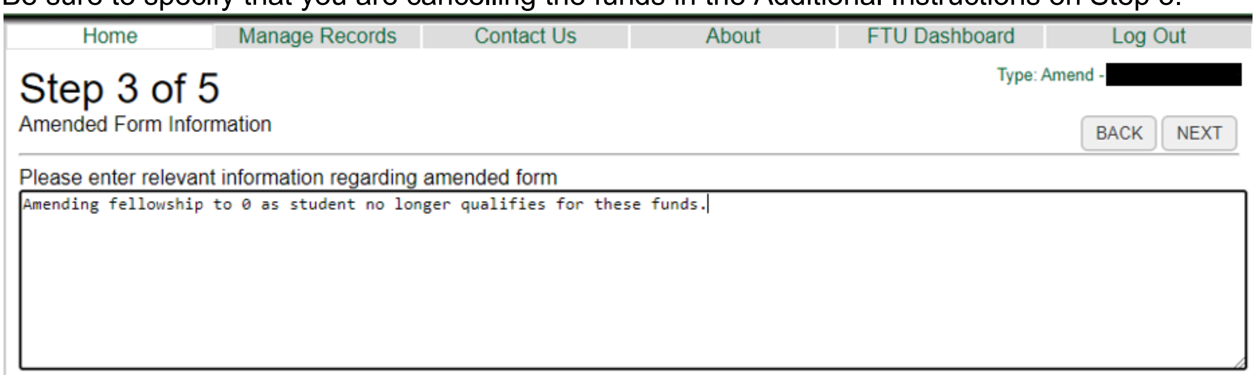

Once a form has been approved, it must be amended to cancel it. Click on the Amend button. To remove the award, you need to Edit the Current Awards.

Current Awards (+/-)

| | Semester | Year | Type |
|---|---|---|---|
| Edit | Summer | 2018 | Fixed Dollar |

To completely cancel an approved fellowship, change the Amount/Percent to **0**, and enter a Purpose before clicking Update. Click Next.

Be sure to specify that you are cancelling the funds in the Additional Instructions on Step 3.




# Tracking a Fellowship

You can track the routing of a fellowship by searching for it in Records Manager. Once you click on the Manage Records Button on the Main Menu, you can enter the fellowship information and search for your record. Once you see it, you can click on the Route button to view where it is at, and who still needs to approve it. Please note that final approval doesn't mean funds have been disbursed or funds should be in the student's account.