Texas Department of Family and Protective Services

Title IV-E Stipend Application

Job Aid for the University Admin

11/14/2024

Version: v1.1

Contents

Section 1. Overview

1.1 Purpose

The purpose of this job aid is to describe the steps that will need to be taken by University Admin to login, view/manage University and Admin details, submit Student Stipend Details to the ROSA/SSCC, Approve or Reject Student's Form 7039 and submit Quarterly Invoices.
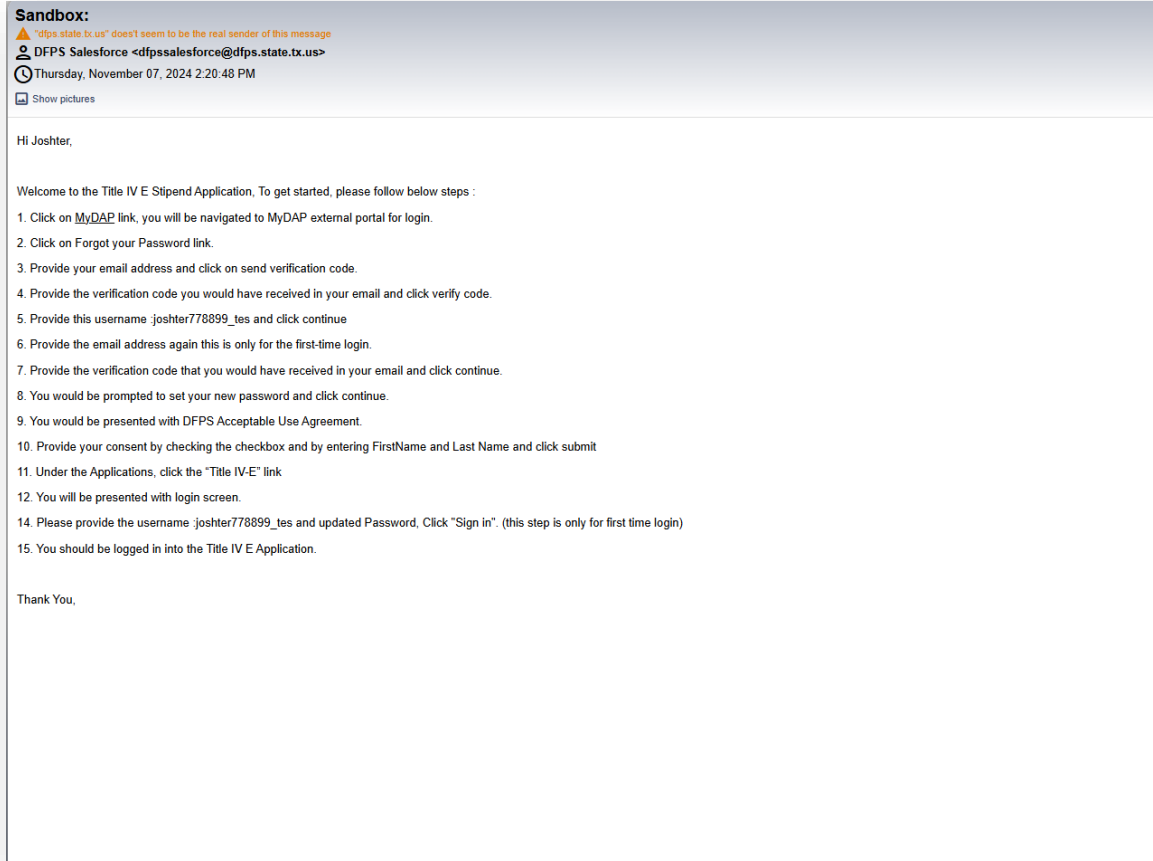
1.2 Scope

The scope of this **Title IVE Stipend Application University Admin Job Aid** is to show University Admins how to login to the system and manage the information on the Title IV-E Application tabs (**MyDetails**, **University, Student, Contract Documents,** and **Invoice)**.

Section 2. Login

2.1 Welcome Email

User will receive an email from DFPS with login instructions: Email will have welcome message and the steps to get access to the application:

Sandbox:
⚠ "dfps.state.tx.us" doesn't seem to be the real sender of this message
👤 DFPS Salesforce <dfpssalesforce@dfps.state.tx.us>
🕐 Thursday, November 07, 2024 2:20:48 PM
🖼 Show pictures

Hi Joshter,

Welcome to the Title IV E Stipend Application, To get started, please follow below steps :

1. Click on MyDAP link, you will be navigated to MyDAP external portal for login.

2. Click on Forgot your Password link.

3. Provide your email address and click on send verification code.

4. Provide the verification code you would have received in your email and click verify code.

5. Provide this username :joshter778899_tes and click continue

6. Provide the email address again this is only for the first-time login.

7. Provide the verification code that you would have received in your email and click continue.

8. You would be prompted to set your new password and click continue.

9. You would be presented with DFPS Acceptable Use Agreement.

10. Provide your consent by checking the checkbox and by entering FirstName and Last Name and click submit

11. Under the Applications, click the "Title IV-E" link

12. You will be presented with login screen.

14. Please provide the username :joshter778899_tes and updated Password, Click "Sign in". (this step is only for first time login)

15. You should be logged in into the Title IV E Application.

Thank You,

1. Click on https://dfpsportal.dfps.texas.gov/, you will be navigated to MyDAP (MyDAP is DFPS's Identity and Access management system) external portal for login.

2. Click on **Forgot your Password** link.
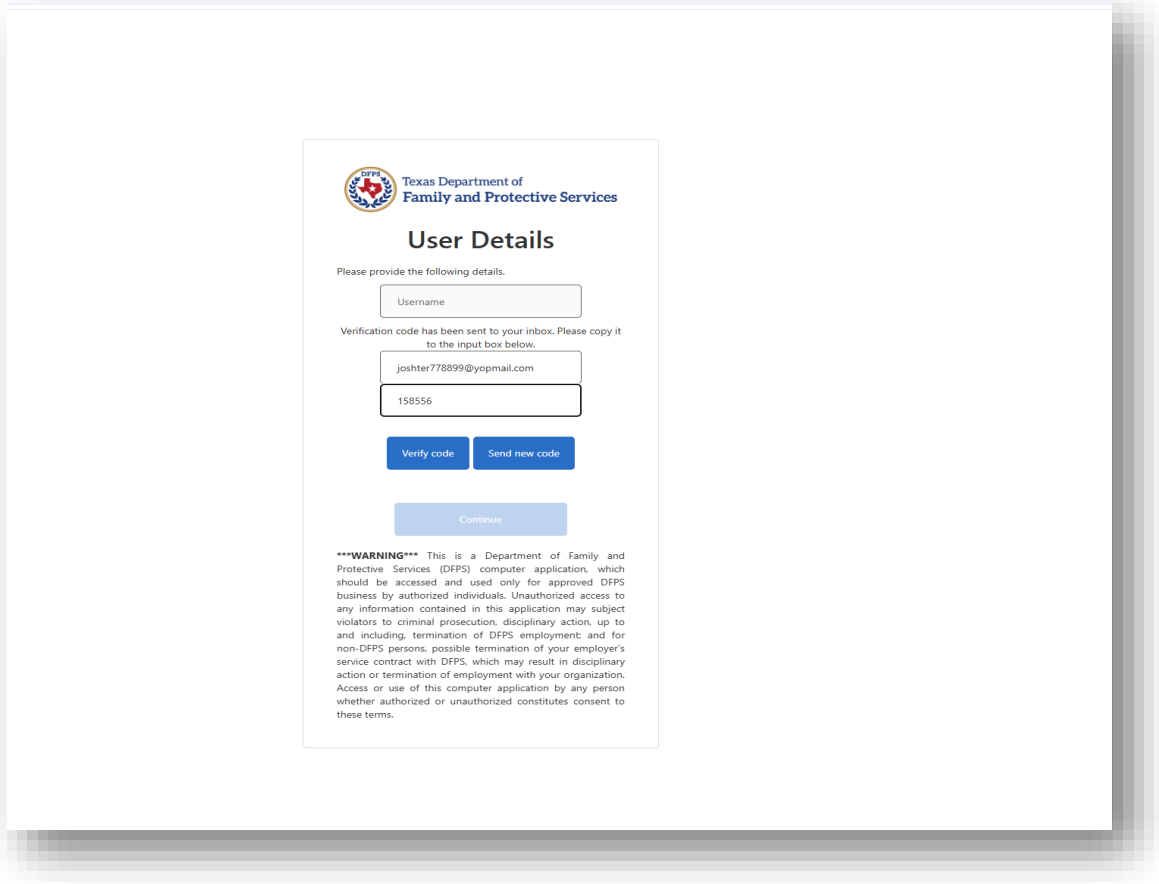

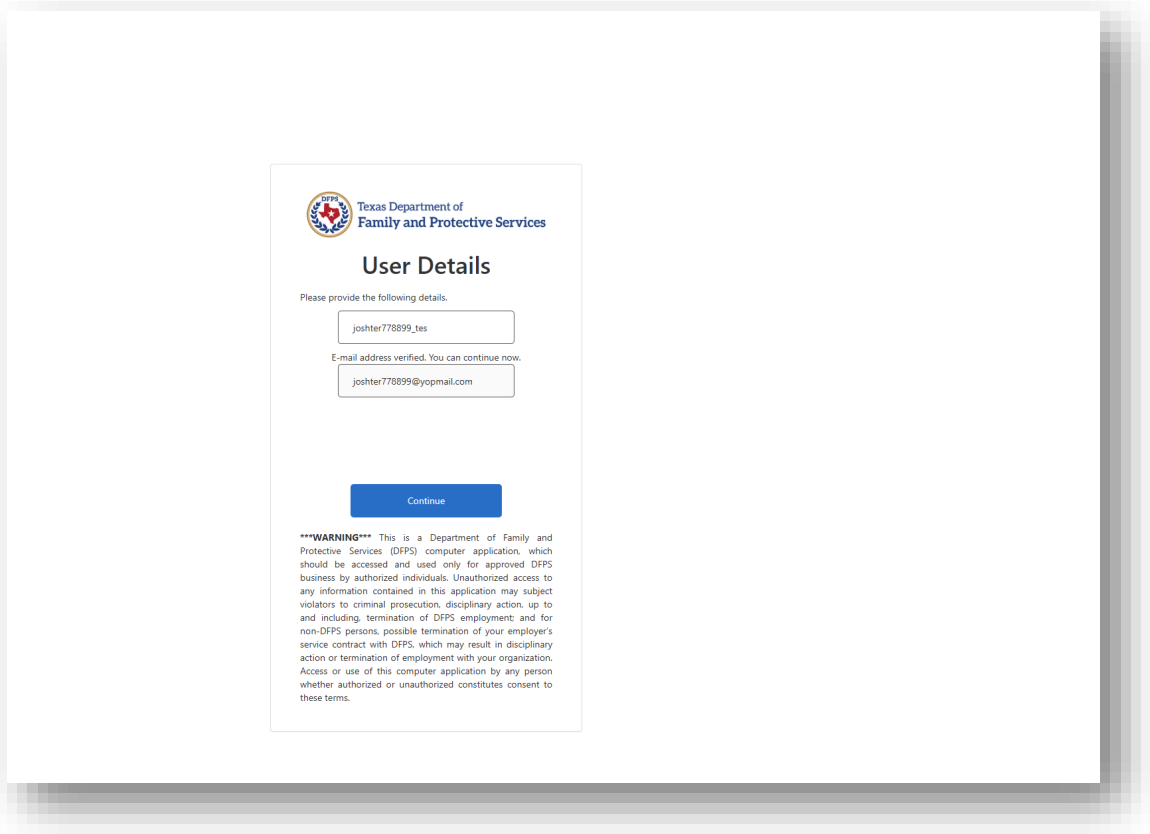3. Provide your email address and click on **send verification code**.

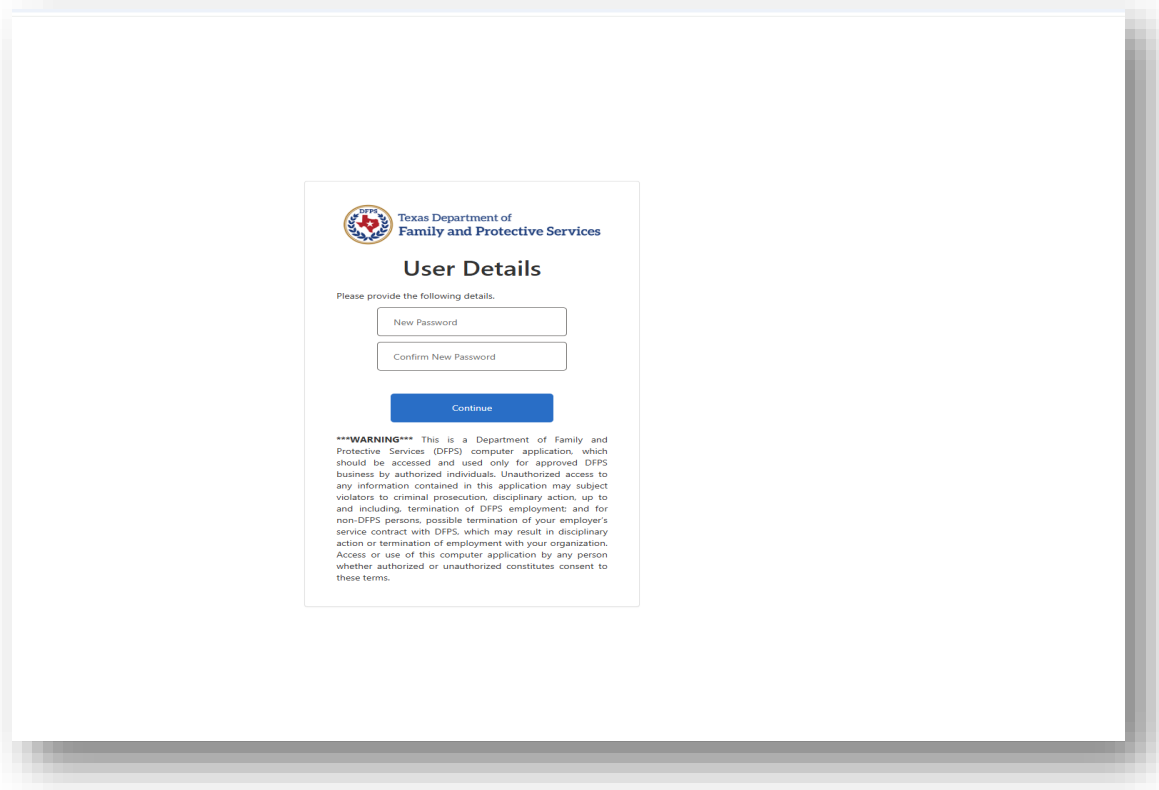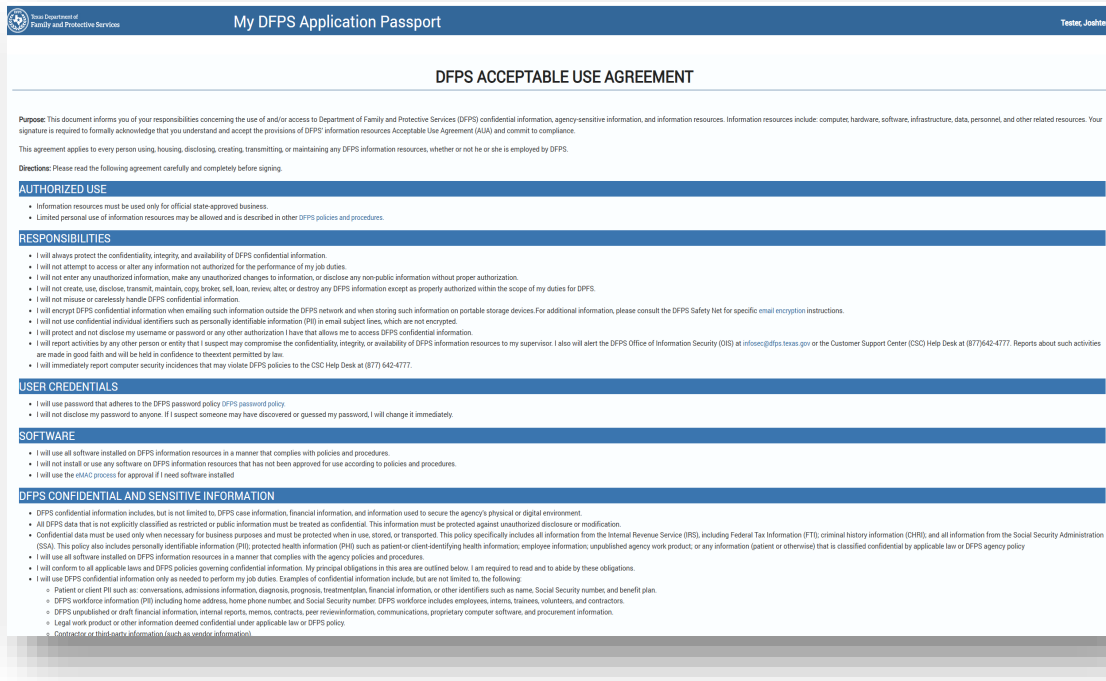4. Provide the verification code you received in a separate email and click **verify code**.
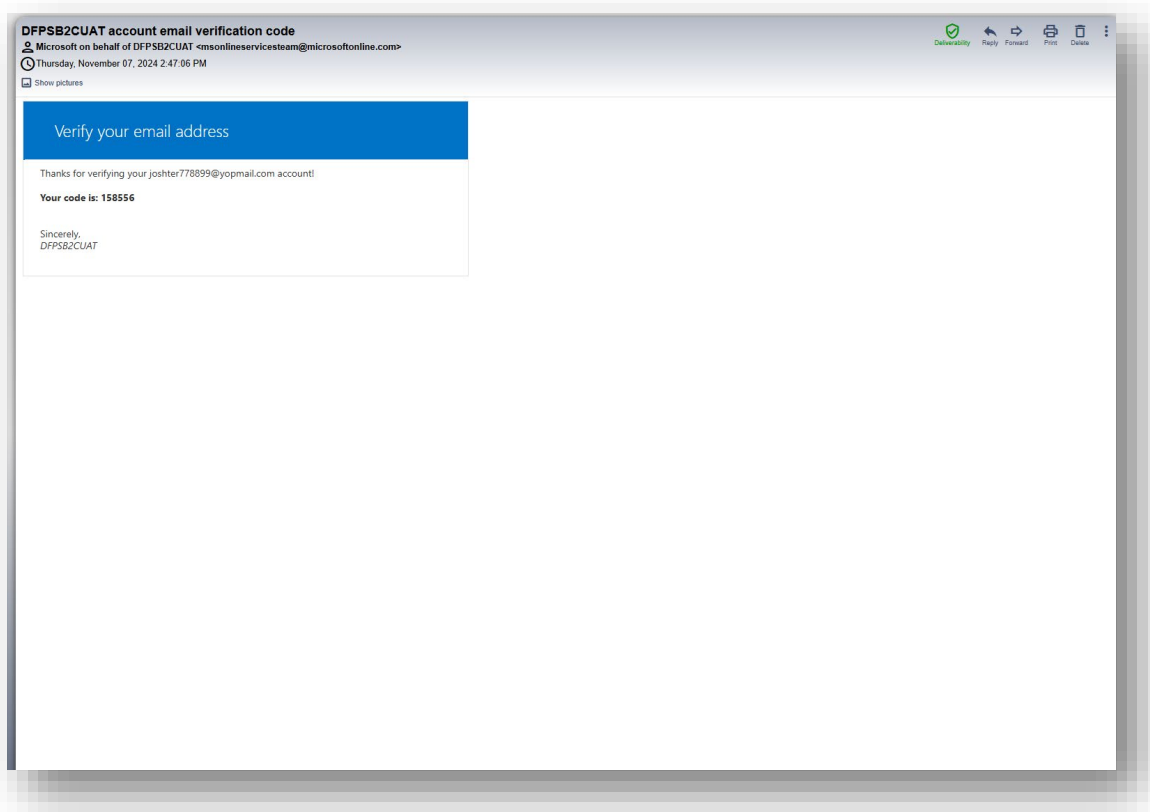
5. Provide the username as shown in your Welcome Email and click **continue**

6. You will be prompted to set your new password and click **continue**.

7. You will be presented with DFPS Acceptable Use Agreement.

Scroll to the bottom of the page

8. Provide your consent by checking the checkbox and by entering FirstName and Last Name and click **submit**

9. Under Applications on the left-hand side of the screen, click the **"Title IV-E"** link

10. You will be presented with login screen.
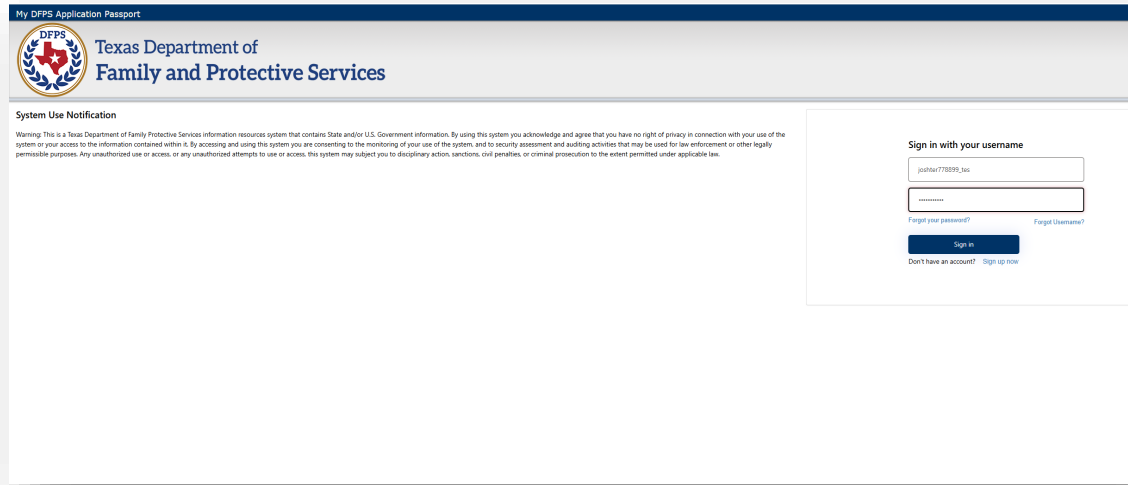
11. Provide -your username and updated Password, Click "**Sign in**". (This step is only for your first-time login.)

12. You will be logged into the **Title IV E Application**.

Notes: Recommended Browser is Chrome. Please bookmark the link for future logins.

2.2 Additional University Admins

Send an email to DFPS (CPSUNIVContracts@dfps.texas.gov) requesting access to the application. A Contract Manager will add the additional admin to the system. Newly added admin will receive an email with login details. (Details are provided in section 2.1.)

The following details needs to be provided in the email:

1. Name of the **University**.
2. **First Name** of the admin
3. **Middle Name** (Optional) of the admin
4. **Last Name** of the admin
5. **Phone** Number
6. **Address** information (**Street**, **City**, **State/Province**, **Zip/Postal Code**, and **Country**).
7. **Role** optional

DFPS should be notified via email to CPSUNIVContracts@dfps.texas.gov when university staff is no longer affiliated with the program or university so that person's access to the application can be deactivated.

Section 3. Title IV-E Application

3.1 Home

When you login to the Title IV-E Stipend Application, you will be initially taken to the **Home** tab, as depicted below. From the **Home** page, you can navigate to **MyDetails** to view and manage admin details, **University** tab to view the University details, **Students** tab to manage Student Stipend details, **Contract Documents** to view Student Contract Documents, **Invoice** tab to view and manage invoices and **Reports** tab to view any available reports.

3.2 MyDetails

Details of the admin (whoever is logging in) can be viewed by either clicking on the **MyDetails** picture or using the **MyDetails** tab provided on the home page. Admin is allowed to update Address and Phone Number by clicking **Update Details** button provided on the bottom of the page. All other details are read only.
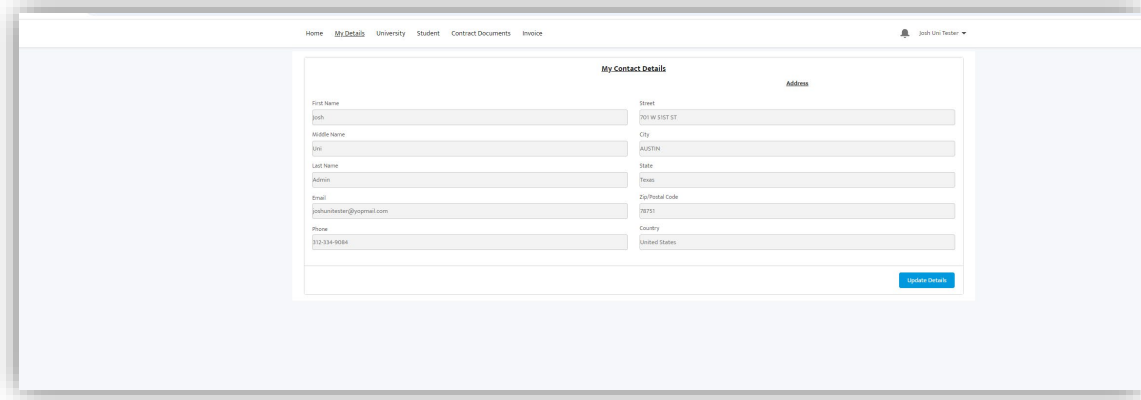
3.3 University

The University **Details** can be viewed by either clicking on the **University** picture or using the tab provided on the home page. University Admin is NOT allowed to update any of the details displayed here (read only).
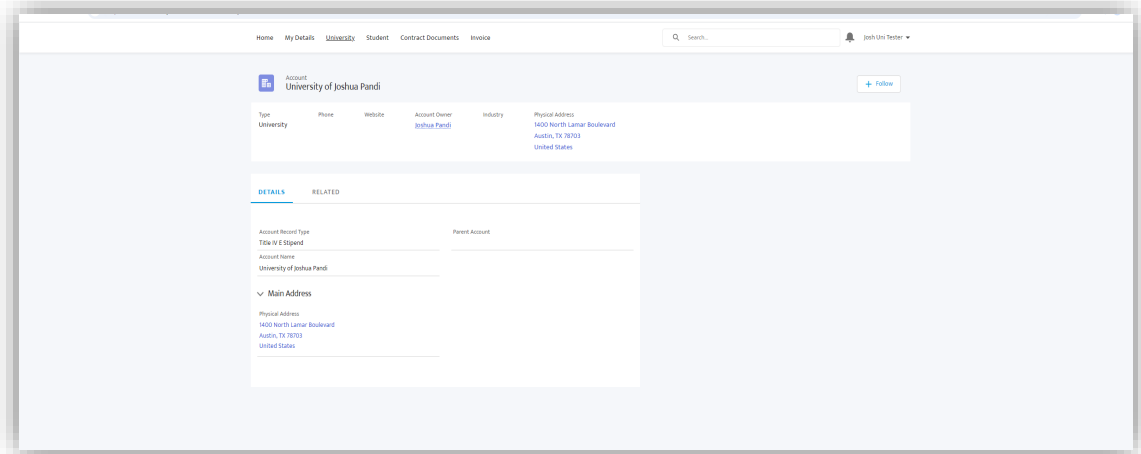
3.4 Student

The University Admin will be able to manage the Students Stipend details by either clicking on the **Student** picture or using the tab provided on the home page.

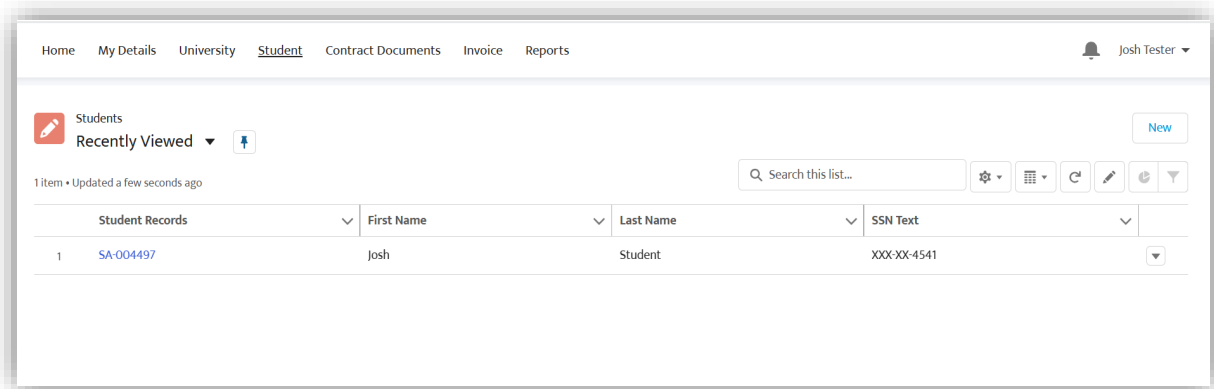1) University Admin can click on the drop-down arrow next to **Recently Viewed** to change the list view from **Recently Viewed** to **All. This view will enable the admin** to view all the students from their university**. University** Admin can also search for a student using free text in the **"Search this list…" search box** option, after updating the list view from **Recently Viewed** to **All.**

2) Click on the **Student Records ID** (Ex: SA-004497) to view the **Student Stipend** Details.
Note: Student Records can be sorted by clicking on the column header

Creating and Submitting New Student Stipend Details to the ROSA/SSCC:

3) University Admin can click on the **New** button to create a new student stipend details in the application
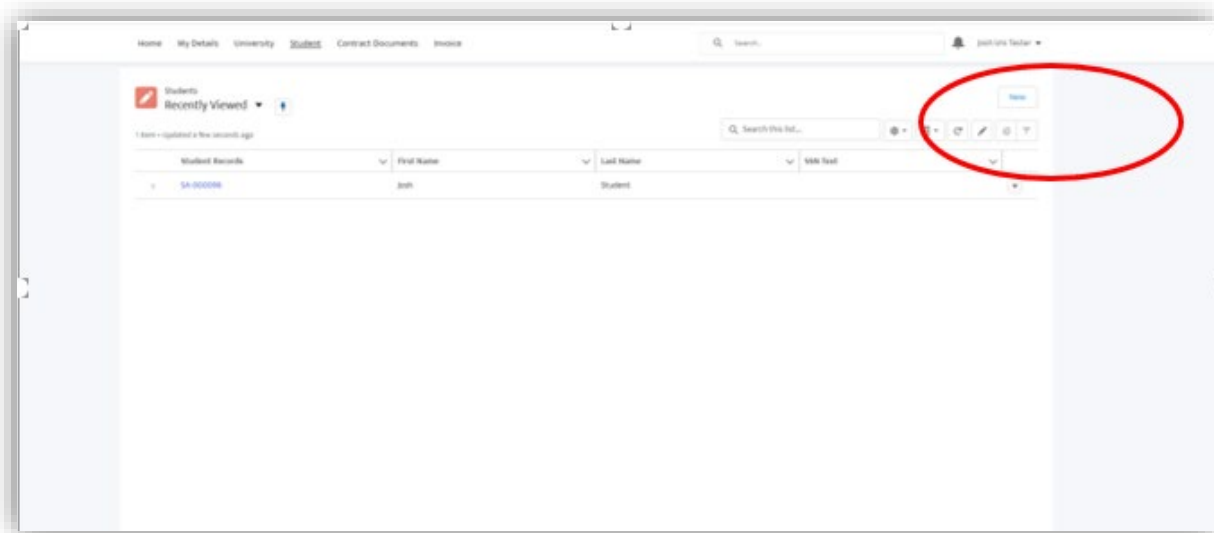
4) University Admin to add **Student Details**:

- Enter First Name – Required
- Middle Name – Optional
- Last Name – Required
- Date of Birth – Required
- University – Required
- Phone Number – Required
- Personal Email – Required
- University Email (Secondary Email) – Required

5) University Admin to add **Stipend Information**:
- Student Status at Initial Stipend – Required Dropdown list
- Degree – Required Dropdown list
- Classification – Required Dropdown list
- DFPS/SSCC – Required Dropdown list
- Search and select a ROSA or SSCC – Required
- Anticipated Graduation Date – Required
- Total Number of Stipends Received per FY – Required Dropdown list
- Max Number of Stipends Received for Program - Required Dropdown list
- Amount of Stipend for Fall

- Amount of Stipend for Spring/Winter
- Amount of Stipend for Summer

Note: DO NOT enter any other details. Admin can select either ROSA or SSCC, system will display error if you select both. System will display error if required fields are left blank (upon save).

6) Click on Save
7) Review the details and edit if required using the **Edit** button provided

8) Click on **Submit** button to submit the student stipend detail to ROSA/SSCC. Email alert is sent to the ROSA/SSCC notifying that the student details are available for their review.
9) Rosa/SSCC may request **corrections** with Student Details submitted by the University Admin. University Admin will receive an email notifying them that corrections are requested.

Sandbox: Title IV E Stipend ROSA/SSSC action Required

DFPS Salesforce <dfpssalesforce@dfps.state.tx.us>
Monday, October 07, 2024 2:01:39 PM

ROSA/SSCC has return student information for SA-000096 with comments in correction required , please review and re-submit the student information
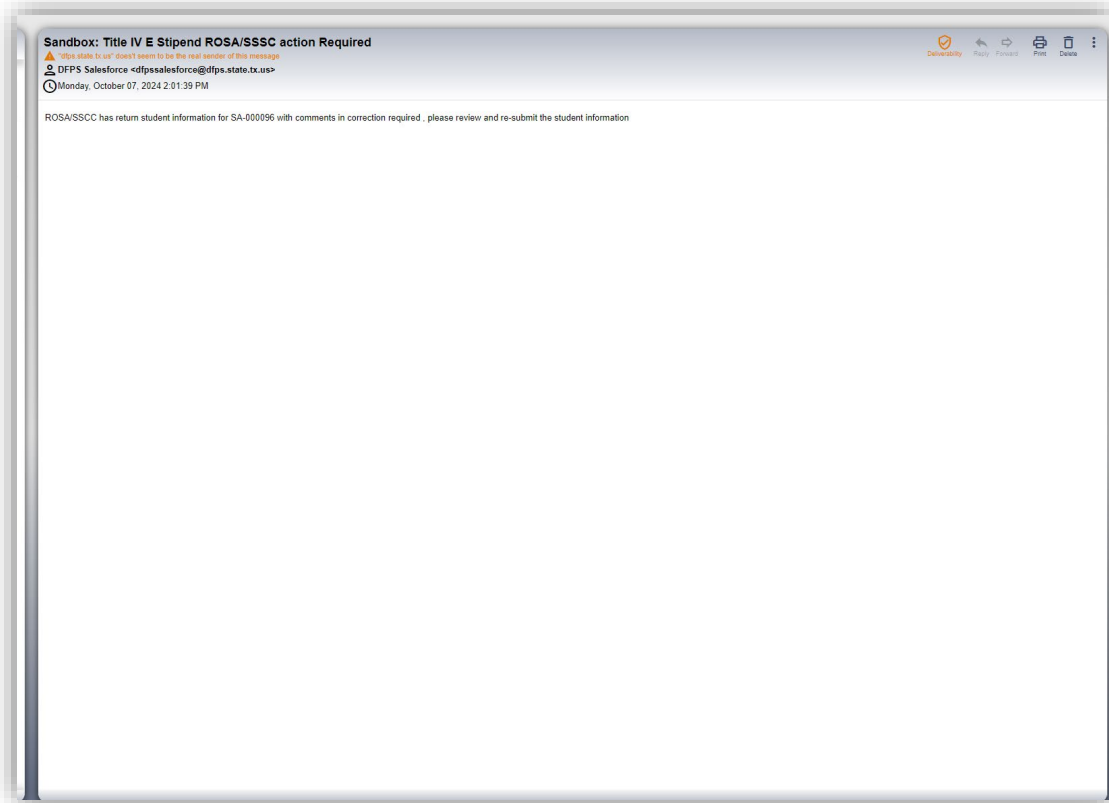
10) University Admin to navigate to the **Student** tab, click on the **Student ID**, refer to the **Corrections Required** field (in the Student Details section) to view the ROSA/SSCC admin comments regarding the required corrections to the Student Stipend Details.
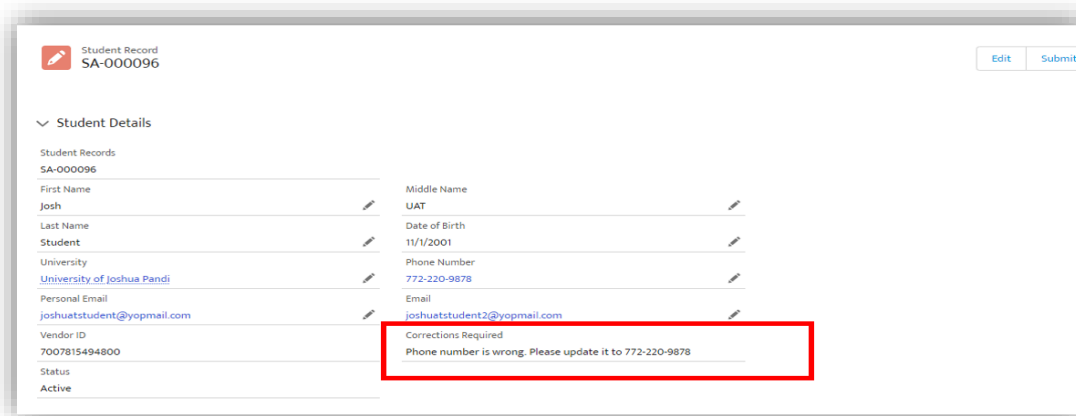
11) Make necessary updates/edits, **Save** and **Submit** to resubmit to the ROSA/SSCC.

Approve or Reject Form 7039 submitted by the Student:

1) University Admin will receive an email alert when student submits **Form 7039**
2) University Admin will navigate to the **Student** tab, click on the **Student ID** (to access the student details), scroll down to the Form 7039 section to review the details.

3) If any correction are required to the **Form 7039**, University admin can **Reject** the **Form 7039** using the button **Form 7039 Corrections Required** (use the drop-down arrow to see additional options). An email Alert is sent to the student to correct the **Form 7039** and resubmit.


4) If NO corrections are required to the **Form 7039**, University admin can **Approve** the **Form 7039** using the button **Approve Form 7039**. Email Alert is sent to the student, ROSA/SSCC and the Contract Managers stating the student's **Form 7039** has been approved by the University.

Updating Student Status to Temporary Pause:

5) University Admin can update the status of the Student to **Temporary Pause** by clicking the down arrow next to Approve Form 7039 and selecting **Temporary Pause**. Provide **Temporary Pause Start Date**, **Reason for Temporary Pause** and **Save**. This will update the Student **Status** (of the Student Details section) from **Active** to **Temporary Pause**.
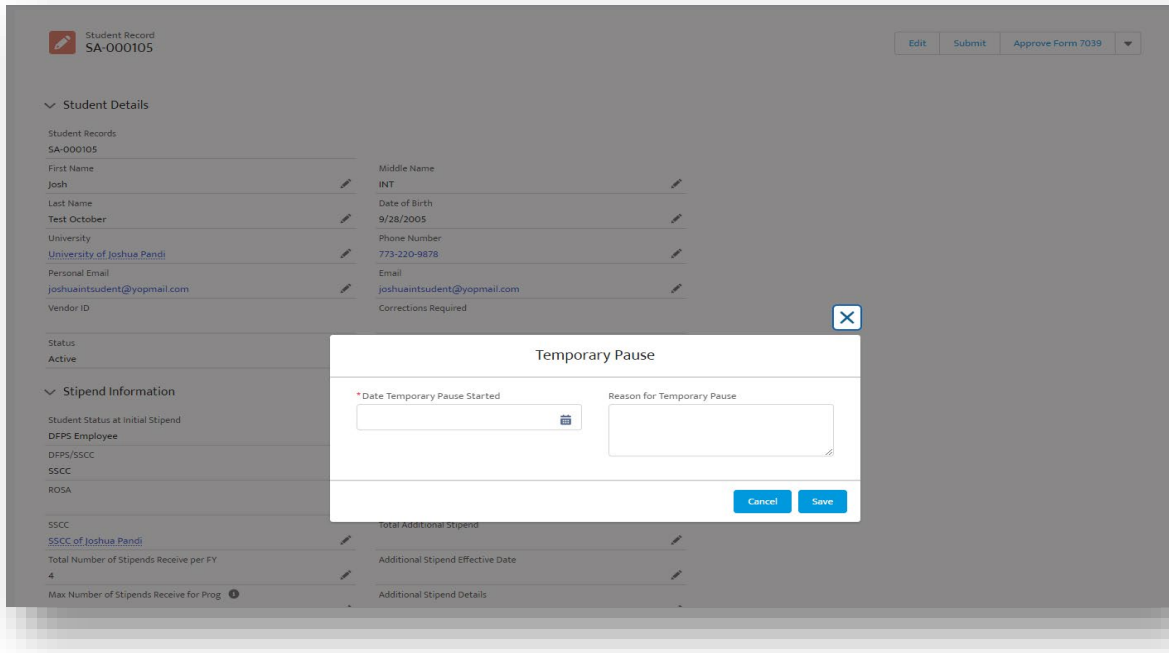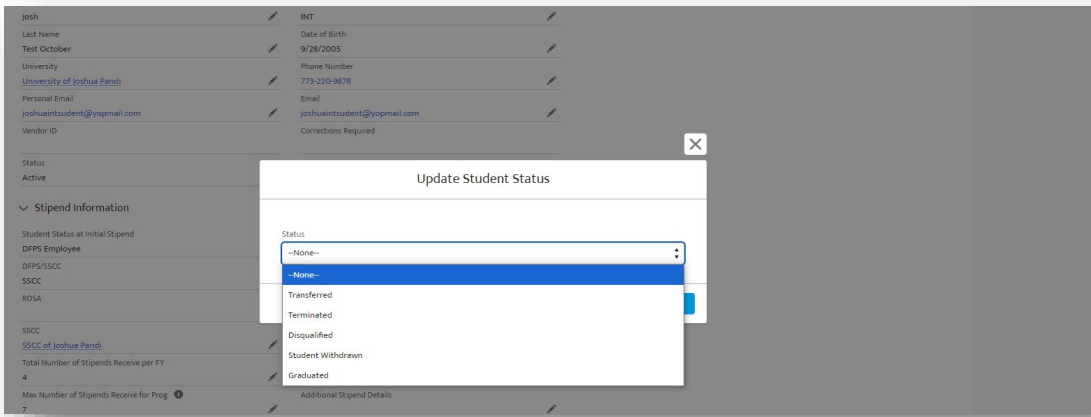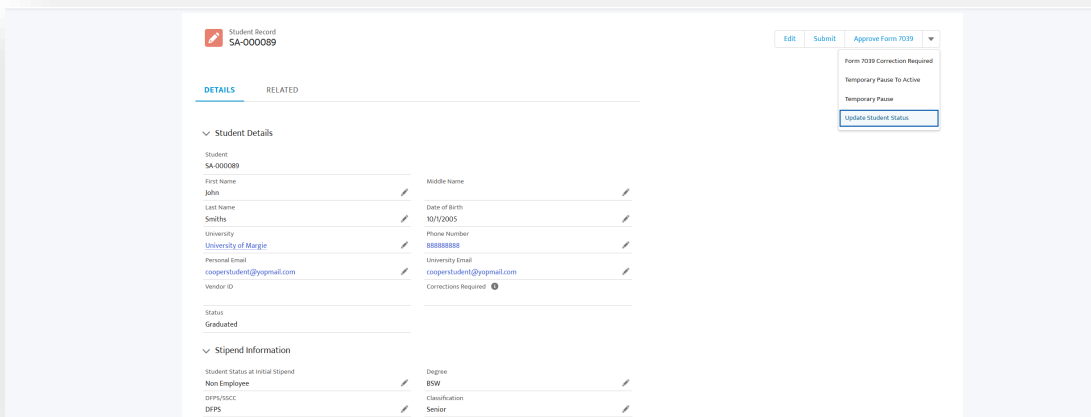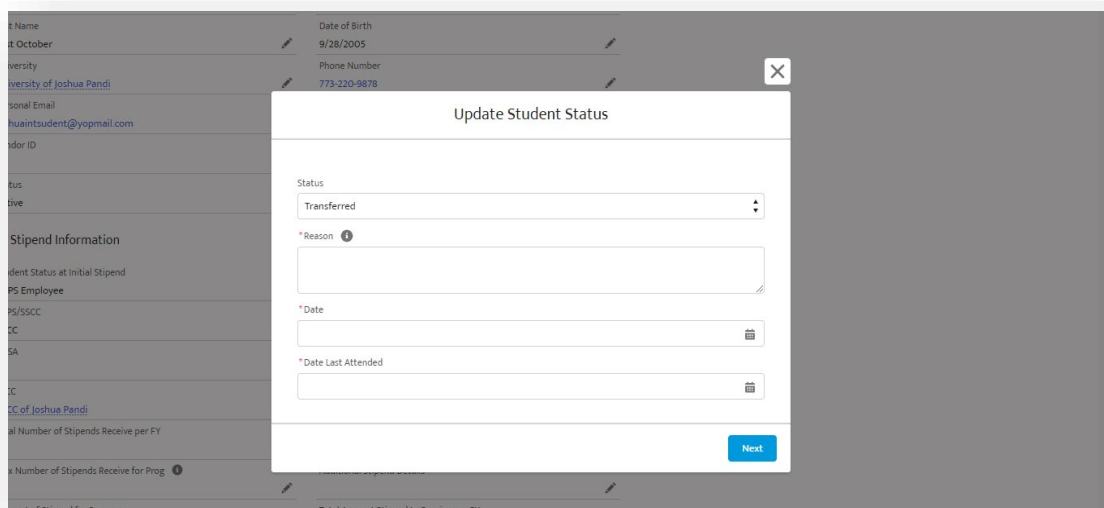
6) University Admin can update the status of the Student from **Temporary Pause** to **Active** by clicking the dropdown option of **Temporary Pause To Active**. Provide **Date Temporary Ended** and **Save**. This will update the Student **Status** (of the Student Details section) from **Temporary Pause** to **Active**.
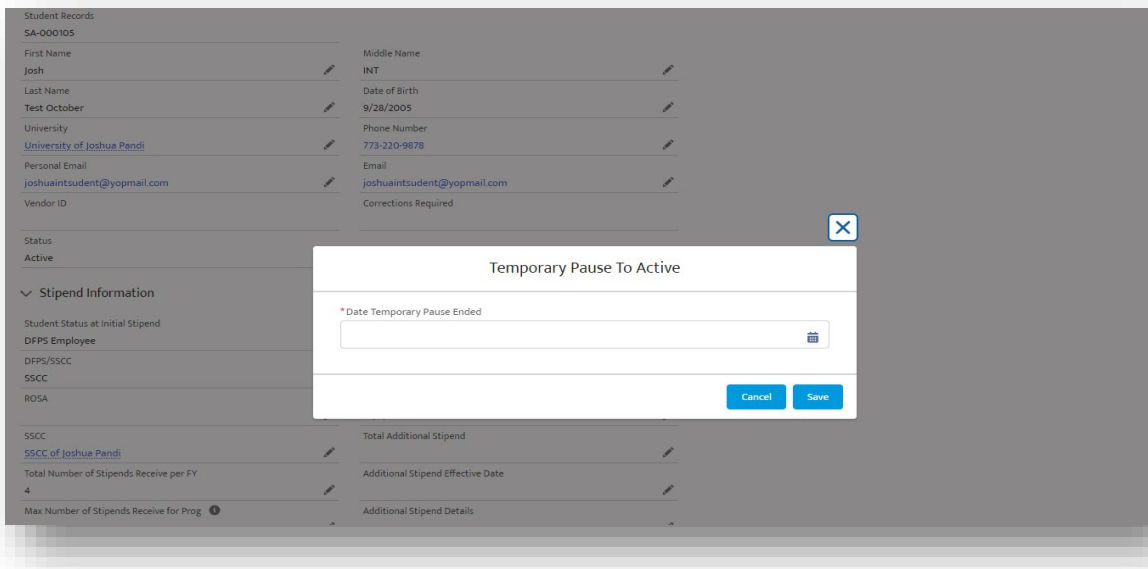
Updating Student Status to Transferred:

1) University Admin can update the status of the Student to **Transferred** by clicking the down arrow next to Approve Form 7039 and selecting **Update Student Status**. Select **Transferred** option from the dropdown list, provide **Reason**, **Date**, **Date Last Attended** and click **Next**.

Updating Student Status to Terminated:

2) University Admin can update the status of the Student to **Terminated** by clicking the down arrow next to Approved Form 7039 and selecting **Update Student Status**. Select **Termination** option from the dropdown list, provide **Termination Reason**, **Date**, **Date Last Attended, Comments** and click **Next**.

Updating Student Status to Disqualified:

3) University Admin can update the status of the Student to **Disqualified** by clicking the down arrow next to Approved Form 7039 and selecting **Update Student Status**. Select **Disqualified** option from the dropdown list, provide **Reason**, **Date**, **Date Last Attended** and click **Next**.

Updating Student Status to Student Withdrawn:

4) University Admin can update the status of the Student to Student **Withdrawn** by clicking the down arrow next to Approved Form 7039 and selecting. **Update Student Status**. Select Student **Withdrawn** option from the dropdown list, provide **Reason**, **Date**, **Date Last Attended** and click **Next**.

Updating Student Status to Graduated:

5) University Admin can update the status of the Student to **Graduated** by clicking the down arrow next to Approved Form 7039 and selecting **Update Student Status**. Select **Graduated** option from the dropdown list, **Actual Graduation Date** and click **Next**.

3.5 Contract Documents

University Admin should click on **Contract Documents** Tab on the home page to view and download the **Final Contracts** that were uploaded by the DFPS Contract Managers. Click on the **Document Name** and not on the Student ID to view the details of the **Contract Document.** Navigate to the **Related** list to download the actual document.

3.6 Invoices

University Admin should to navigate to the **Invoice** Tab from home page to view previously submitted **Invoices**.
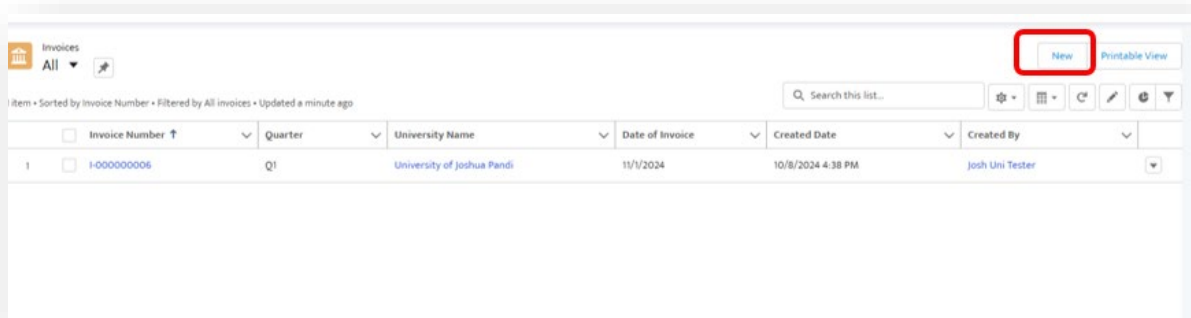
1) University Admin can use the **New** button provided to create and submit a new **Invoice** to the DFPS Contract Manager.

2) Select the **University** if required**,** provide **Date of Invoice** and **Quarter** and **Save**

3) Navigate to the **Related** tab of the **Invoice** and click **New** button. Click **New** button on the **Invoice Line Items** to add **Invoice line items.**

4) Provide **Student Name**, **Date of Disbursement**, **Stipend Amount** of the Student, **Semester of Disbursement** and click **Save** or Click **Save & New** to add one more **Invoice Line Item.**
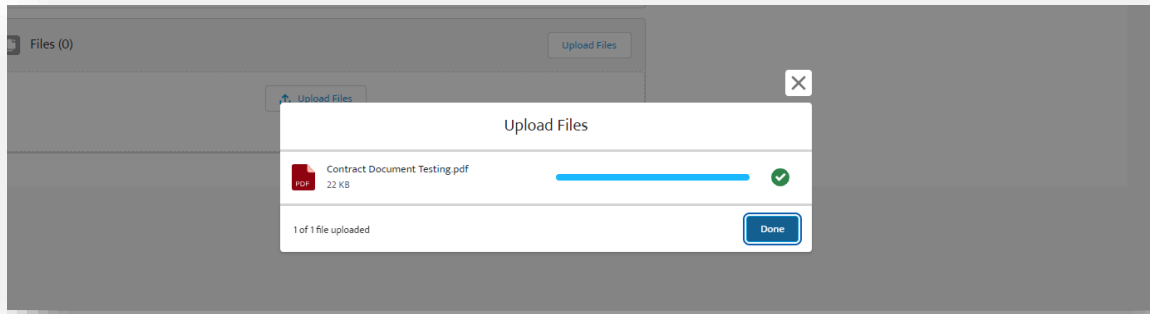
5) Upload **Invoice attachment** by clicking on **Upload Files** of the **Files** section on the **Related** tab**.** After providing all the details and attaching/uploading an invoice document, admin can click on the **Submit** button**.**

3.7 Reports
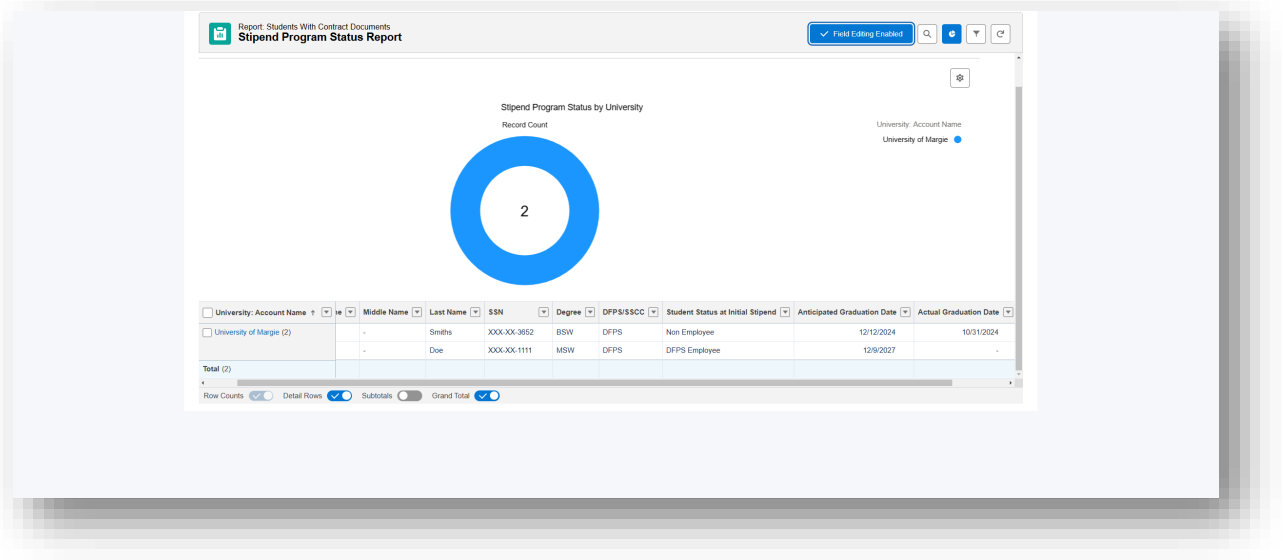
Limited reports are available for the University Admin. Reports can be viewed by either clicking on the **Reports** picture or using the tab provided on the home page. Admin can click on the **Report Name** to view the **Report**.
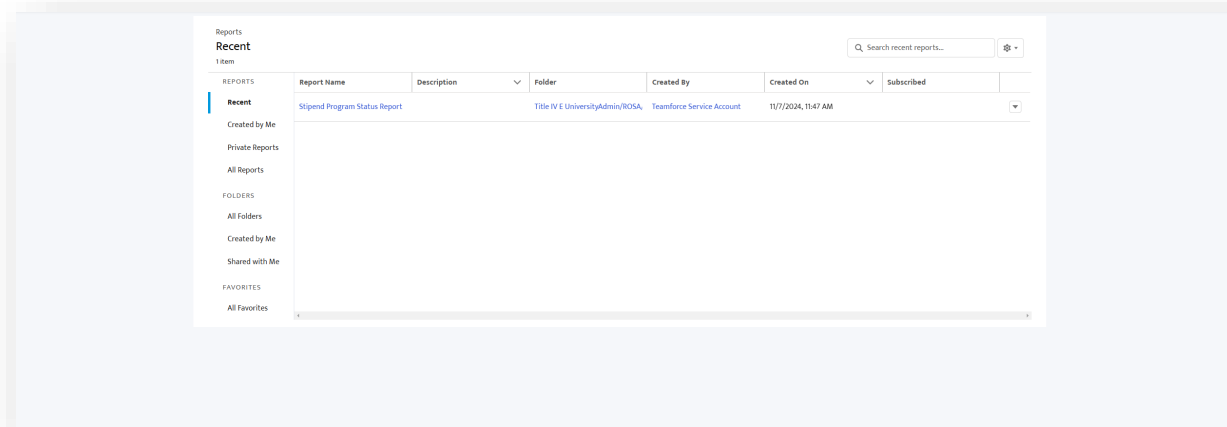
Section 4. Revision History

Version	Date	Name	Description
1.0	11/12/2024	Joshua Pandi	Initial version of this document.
1.1	11/14/2024	Joshua Pandi	Updated based on the review and feedback from the users.