

# Instructions for creating and uploading COF student payment template

## COF Payment Site:



<https://chooseohiofirst.ohiohighered.org/>

## Words of caution before you begin:

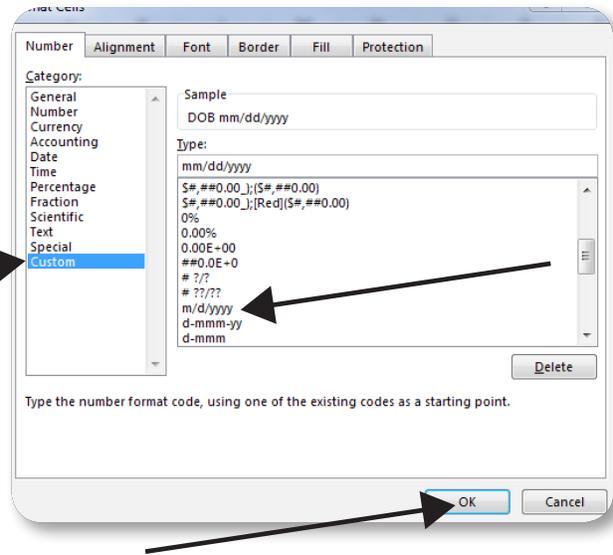
1. Do not delete any columns (i.e. Student ID). Though you may not be putting any information into a particular column, it must stay in the spreadsheet to match up with the system.
2. Format the entire column – not just the specific cells (click on column heading when formatting).

## Instructions:

1. Download COF payment template from COF data reporting site and save as an Excel file on your computer.
2. Enter your data.
3. Format each column as follows:

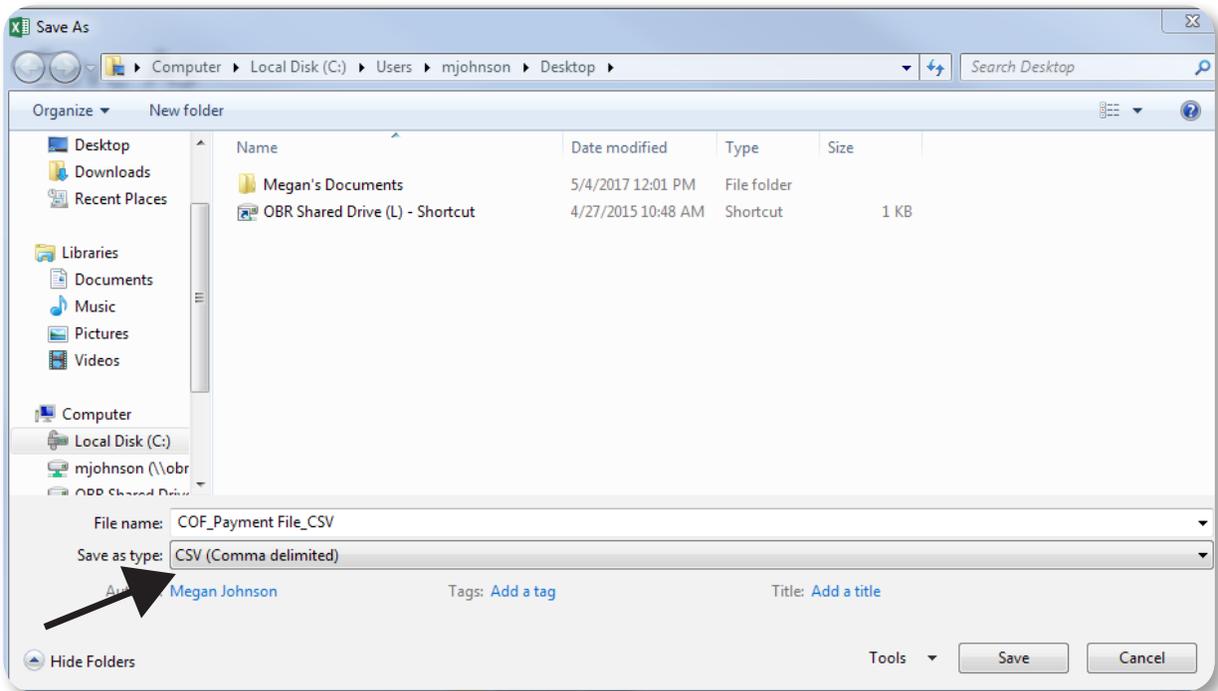
Field Names	Field Attributes and Procedures	Format as
SSN	Enter the federally assigned Social Security Number (SSN). If SSN has leading zero, be sure it is there or add.	Text
Student ID	Leave blank – but do NOT delete this column	
Last Name	If last name has changed, please contact program manager.	Text
First Name	If first name has changed, please contact program manager. Put middle initial if system has initial for previous records.	Text
Proposal Number	Field should hold leading “0” after formatting to Text. Add “0” after formatting, if necessary. Put zero at end of number as well (i.e. 08.10).	Text
Cumulative GPA	GPA should be filled out to the one-hundredths place. (x.xx)	Numeric
Major CIP Code	Field should hold leading “0” after formatting to Text. Add if missing. (030104)	Text
Minor CIP Level	Field should hold leading “0” after formatting to Text. Add if missing.	Text
Degree Level	Field should hold leading “0” after formatting to Text. Add if missing. (05, 07)	Text
Home Zip Code		Numeric
Gender	Use Drop-down list from template (M/F/U)	Text
Date of Birth	mm/dd/yyyy	Custom, Select mm/dd/yyyy (if this is not available, select m/d/yyyy and then add an extra m and d where it says ‘type’)
Race Code	Use Drop-down list from template	Text
First Generation / Low Income	Y or N	Text
Co-Op / Internship	Y or N	Text
Displaced Worker	Y or N	Text
Student Email Address		Text
Award Amount Requested	(\$ ) not needed / decimals accepted	Numeric

Note: When you format the DOB column, the screen shot here shows the formatting you should select:

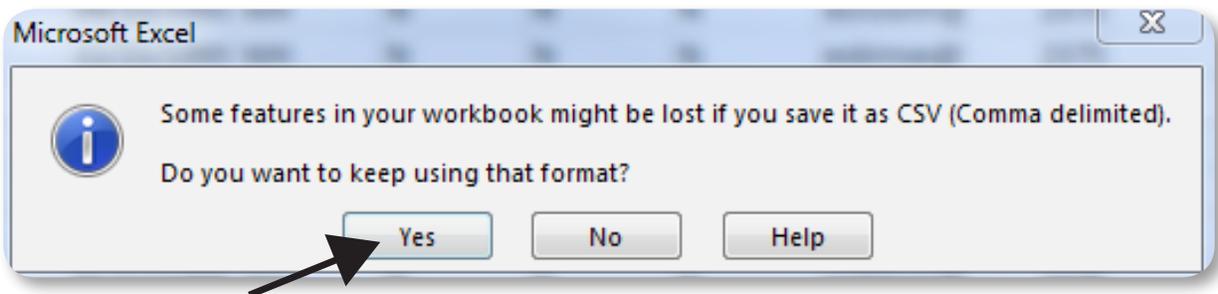


Once you are sure the data is correct and correctly formatted, save the file (as Excel).

4. Now, create a copy of this file, saving as a CSV file.

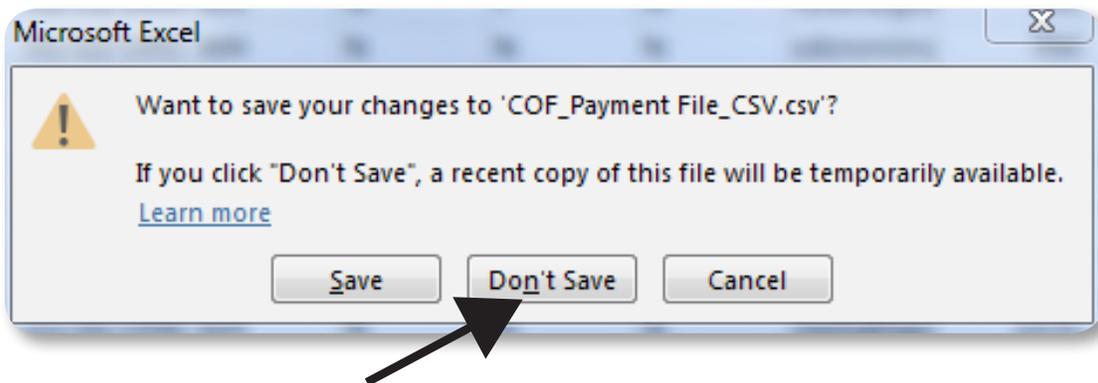


5. When you save as a CSV file, you will see the following message:



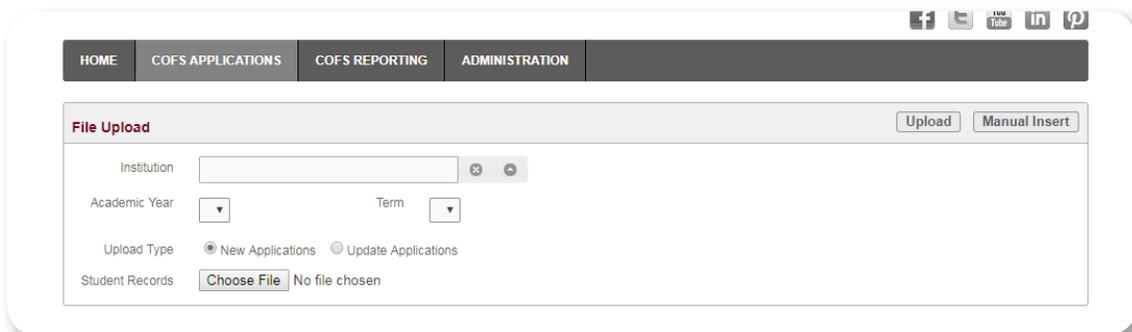
Click on 'Yes.'

- Now, close the file (clicking the X in the top right corner). When you try to close the file, the following message will appear:



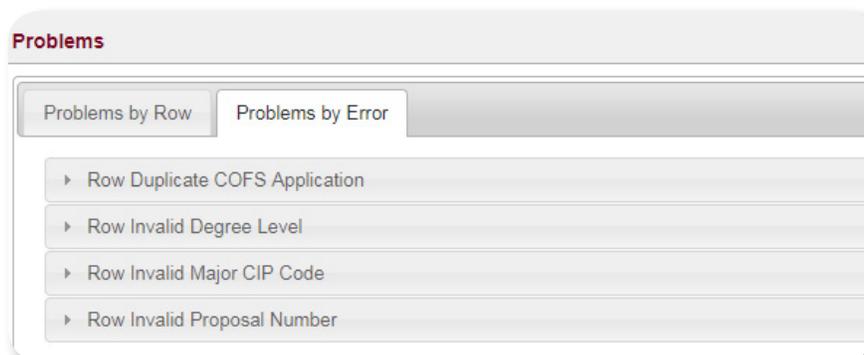
Click on 'Don't Save.' This seems counterintuitive, but trust me. It works!

- Now, go into the COF system (under the COFS Applications tab) and upload your CSV file. Select your institution, term & year should automatically populate, select 'New Application,' and choose the CSV file to upload. Then press 'Upload.'



If your file has been submitted accurately and without errors, you will be able to fully submit it and shortly thereafter you will receive a system-generated notification (via email) of the upload. Hooray!

**If your file contains errors, you will receive a message like the following:**



- If you click on one of the items in the '**Problems by Error**' tab, you can see the type of error and the row(s) affected.
- If you click on the '**Problems by Row**' tab, you can see which rows have errors (but not what the error is).

8. To resolve the error:
  - Delete the CSV file you uploaded so that it is not hanging around getting things confused.
  - Open the **original** Excel file that contains your data. Search for the errors in **this** file (according to the information listed in the error message above), and correct them.
  - Save again as an Excel file.
  - Now, save a **new copy** as a CSV file and try uploading again.
9. Hopefully you have now had a successful upload. If not, hopefully the number of errors has been reduced and you can correct the final few errors. Follow the same process above until you receive a successful submission.

### **Tips for Successful Payment Uploads**

The COF system and upload process is very particular (persnickety, if you will!). Something as small as a middle initial (to a person's name) can cause an error.

- Be sure the first name and last name you are submitting exactly match the way the name was entered into the COF system in the past. If you are entering 'Michael Johnson,' but the system has his other records as 'Michael M Johnson,' you will receive an error. You can look up individual students in the system to see how they were uploaded in the past. Any mismatch will result in an error. Correct your template or the records in the COF system to be sure they match.
- Any mismatch between the student's current record and what was uploaded in the past will result in an error (birth date, SSN, First Name in Last Name column, Last Name in First Name column, etc.).
- If you have new students, your institution must submit the HEI Student Entrance (SE) file before you upload your submission or you will receive errors (the COF system will not recognize the new students). If your institution is not yet ready to submit the SE file, you can ask them to submit just the few students in your payment upload that are new.

#### **Note:**

There are probably other ways to format your file and obtain a successful upload. If you have found a system that works for you, use that one. I've tested these instructions and know that they work, which is why I'm passing them along to you.

If you have repeatedly tried to upload your files and are not successful, please feel free to contact me and we will work through it together.

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***Thanks for all you are doing on behalf of COF scholars!***