How to Award a Departmental (non-Foundation) Scholarship to One or Multiple Students

1.) Click on the Scholarship Disbursement Request Form link.
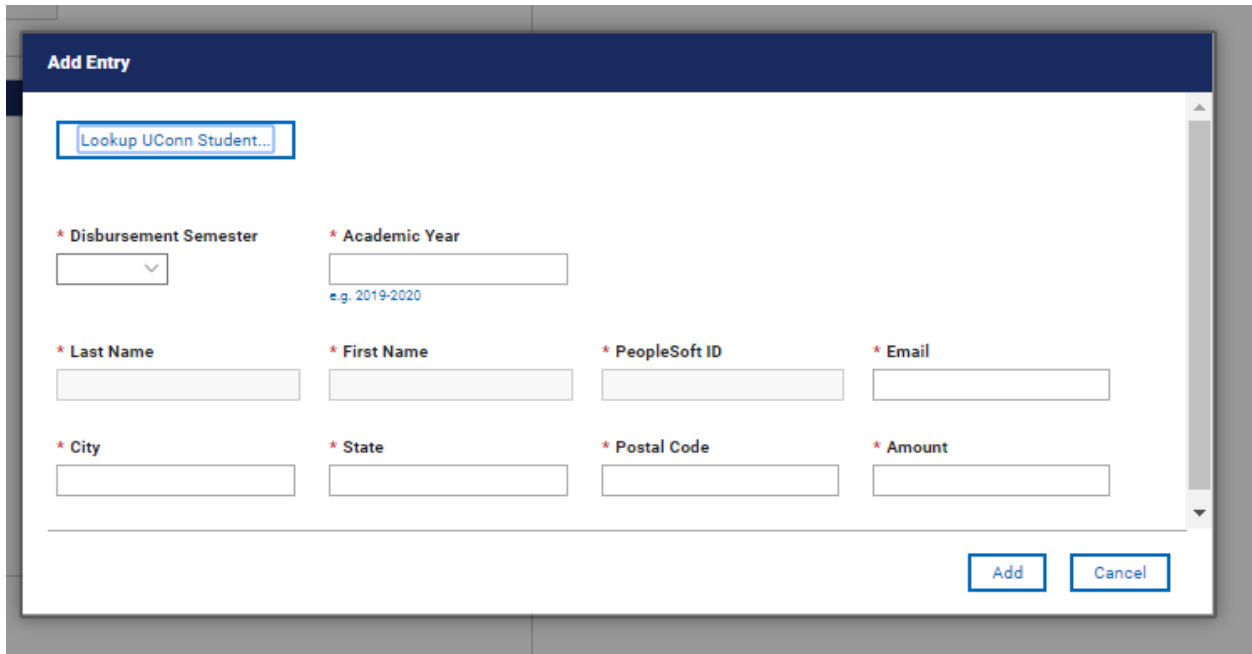2.) Your demographic information will auto populate under Requestor Details.

OSFAS SCHOLARSHIP SYSTEM
SCHOLARSHIP DISBURSEMENT REQUEST

Requester Details

* Last Name	* First Name	* Department
Fernandes	Carrie	Financial Aid

* NetID	* PeopleSoft ID
cep08015	

* Email	Phone Number	* Unit
carrie.fernandes@uconn.edu	(860) 486-2819	UNIT 4116

3.) Under Scholarship Information, select **UConn Accounting Office KFS #**.
4.) Enter the KFS # that is associated with the scholarship (7 digits).
   a. *If a scholarship already exists in PeopleSoft for that particular KFS #, the scholarship name will be available to select in the Scholarship box.*
   b. *The item type will auto populate once you select the scholarship. The item type is used by the Financial Aid Office to award the scholarship as part of the student's financial aid package.*
   c. *If a scholarship cannot be found, a pop up box will appear that provides a link to Create a New Scholarship. Please double-check the KFS # or Foundation # to ensure they are accurate before submitting a request to Create a New Scholarship. If they are correct and scholarships have been awarded in the past, please reach out to the Office of Student Financial Aid Services for troubleshooting.*
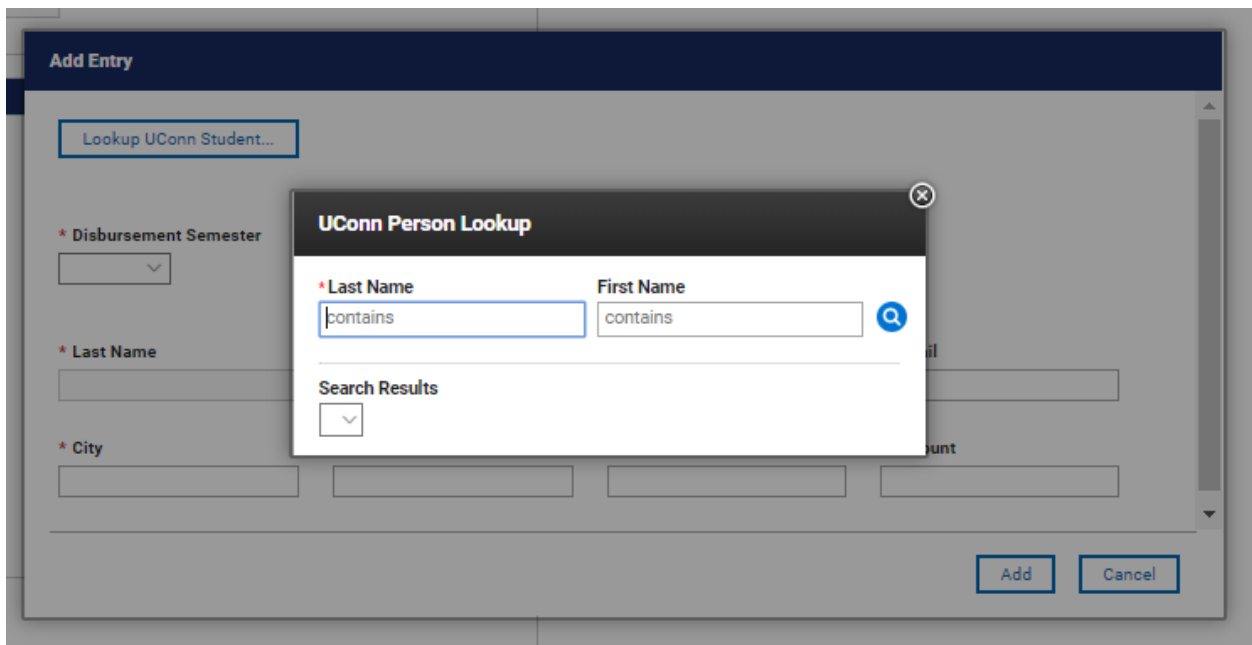
Scholarship Information

* Account Type
  ● UConn Accounting Office KFS
  ○ UConn Foundation

* UConn Accounting Office KFS #

2769120
7 digits - e.g. 2926000

* Scholarship ❓
University Honors Scholarship ⌄

* Item Type
900023038350

* Scholarship Recipients
number of recipients: 0

Last Name	First Name	PeopleSoft ID	Amount	Disbursement Semester	Academic Year	Signatory Approved	OSFAS Processed	Cancelled	
				There are no submissions.					

⊕

Add Recipients from CSV...

5.) To add a recipient, select the ⊕ sign and another box will pop up to enter the student's information.

Add Entry

Lookup UConn Student...

* Disbursement Semester	* Academic Year
⌄	
	e.g. 2019-2020

* Last Name	* First Name	* PeopleSoft ID	* Email

* City	* State	* Postal Code	* Amount

Add   Cancel

6.) Select **Lookup UConn Student** to enter in your recipient's information. Provide the Last and first name, click on the magnifying glass, and then select the correct student in the Search Results box.

Add Entry

Lookup UConn Student...

UConn Person Lookup

* Disbursement Semester

*Last Name	First Name
contains	contains	🔍

* Last Name

Search Results

⌄

* City

Add   Cancel

7.) Once the student is selected, the student's information will auto-populate (name, PS ID, email, city, state, and postal code).

Add Entry

Lookup UConn Student...

* Disbursement Semester   * Academic Year

[⌄]   [   ]
                            e.g. 2019-2020

* Last Name   * First Name   * PeopleSoft ID   * Email

* City   * State   * Postal Code   * Amount

[Add] [Cancel]

8.) Enter the semester or year that you wish to award the scholarship for (**Disbursement Semester**).
   a. *If you are awarding a scholarship for ONE semester only, select the appropriate semester (i.e. Fall, Spring, or Summer).*
   b. *If you are awarding a scholarship for the FULL academic year, to be split between the Fall and Spring semesters, select Full Year.*
9.) Enter the **Academic Year** the scholarship is meant for.
10.) Enter the **Amount** of the scholarship award.
11.) Select Add.

Add Entry

Lookup UConn Student...

* Disbursement Semester   * Academic Year

[Full Year ⌄]   [2020-2021   ]
                            e.g. 2019-2020

* Last Name   * First Name   * PeopleSoft ID   * Email

* City   * State   * Postal Code   * Amount

Vernon Rockville CT   060665033   5000

[Add] [Cancel]

12.) The scholarship recipient will then show up under the Scholarship Recipients table. If you have additional recipients for the same scholarship, continue steps 5 – 11.
   a.   If you have additional recipients but for a different scholarship, Select Submit at the bottom of the page and repeat the process with the different KFS #.
13.) Select **Submit** at the bottom of the page for the Scholarship Disbursement Request Form to then be routed to the Authorized Signatories listed at the bottom of the form.

How to Award a Foundation Scholarship to One or Multiple Students

1.) Click on the Scholarship Disbursement Request Form link.
2.) Your demographic information will auto populate under Requestor Details.

OSFAS SCHOLARSHIP SYSTEM
SCHOLARSHIP DISBURSEMENT REQUEST

Requester Details		
* Last Name	* First Name	* Department
Fernandes	Carrie	Financial Aid
* NetID	* PeopleSoft ID	
cep08015	▓▓▓▓▓▓	
* Email	Phone Number	* Unit
carrie.fernandes@uconn.edu	(860) 486-2819	UNIT 4116

3.) Under Scholarship Information, select **UConn Foundation**.
4.) Enter the **UConn Foundation #** (i.e. account, 5 digits).
5.) Select the appropriate **School/Division** – the Foundation Department Number will auto-populate.
6.) Select the appropriate scholarship under the Scholarship drop down.
7.) Follow steps 5 – 12 from the "How to Award a Departmental (non-Foundation) Scholarship to One or Multiple Students".
8.) Select **Submit** to complete the initial stage of the Scholarship Disbursement Request form.
   a. *IMPORTANT: Individual scholarship requests or one submission totaling o$10,000 or greater for Foundation scholarships will require the Primary Authorized Signatories to approve the request in the workflow. While Primary and Secondary Authorized Signatories will receive an email notification that a scholarship is ready to be reviewed and approved, only the Primary Authorized Signatory should approve. Otherwise, the form will be sent back through the workflow to be approved by the appropriate individual.*

Account Signatory
Foundation Account Number: 28070
Authorized Signatories: Carrie E Fernandes, Jason W Card

Submit   Reset Form

How to Bulk Upload Departmental or Foundation Scholarships using a CSV File

This process can be used to award a number of students with one scholarship disbursement request, by utilizing a CSV upload. This may be most beneficial for individuals or departments submitting large recipient rosters for one KFS or Foundation account. Only one CSV upload can be used per account number.

1.) Follow the same steps in the previous procedures until you reach Scholarship Recipients.
2.) Select **Add Recipients from CSV**.

3.) The **Upload Student Data** box will then appear.

4.) Copy and paste the text from the CSV file and select, **Process CSV Data**.

a. *For instructions on how to format the data or create a CSV file, see "How to Create a CSV File for Bulk Upload".*

Upload Student Data

Student CSV Data

F_FirstName,F_LastName,F_PeopleSoftId,F_Email,F_City,F_State,F_PostalCode,F_Amount,F_Semester,F_Year
John,Doe,123456,john.doe@email.com,Manchester,CT,4321,8500,Full Year,2019-2020
Suzzie,Smith,987654,suzzie.smith@email.com,Beverly Hills,CA,90210,50,Spring,2020-2021
Alan,Johnson,5678923,alan.johnson@email.com,Peducah,KY,01010,15000,Fall,2019-2020
Kate,Mueller,654321,kate.mueller@email.com,Sheboygan,WI,1,10000,Summer,2020-2021|

Process CSV Data

5.) Once uploaded, the recipient information will then be loaded to the Scholarship Recipients box.

* Scholarship Recipients
number of recipients: 4

Last Name	First Name	PeopleSoft ID	Amount	Disbursement Semester	Academic Year	Signatory Approved	OSFAS Processed	Cancelled	
Doe	John	0123456	$8,500.00	Full Year	2019-2020				✏ 🗑
Smith	Suzzie	0987654	$50.00	Spring	2020-2021				✏ 🗑
Johnson	Alan	5678923	$15,000.00	Fall	2019-2020				✏ 🗑
Mueller	Kate	0654321	$10,000.00	Summer	2020-2021				✏ 🗑

⊕

⚠ This value is required

Add Recipients from CSV...

Please upload Supporting Documentation if the award is intended for reimbursement of student expenses related to research, study abroad, etc.

Select File: Choose File   No file chosen

Account Signatory

Foundation Account Number: 28070

Authorized Signatories:

Submit   Reset Form

6.) If all information is accurate and loaded correctly, select **Submit** to complete request.

How to Create a CSV File for Bulk Upload

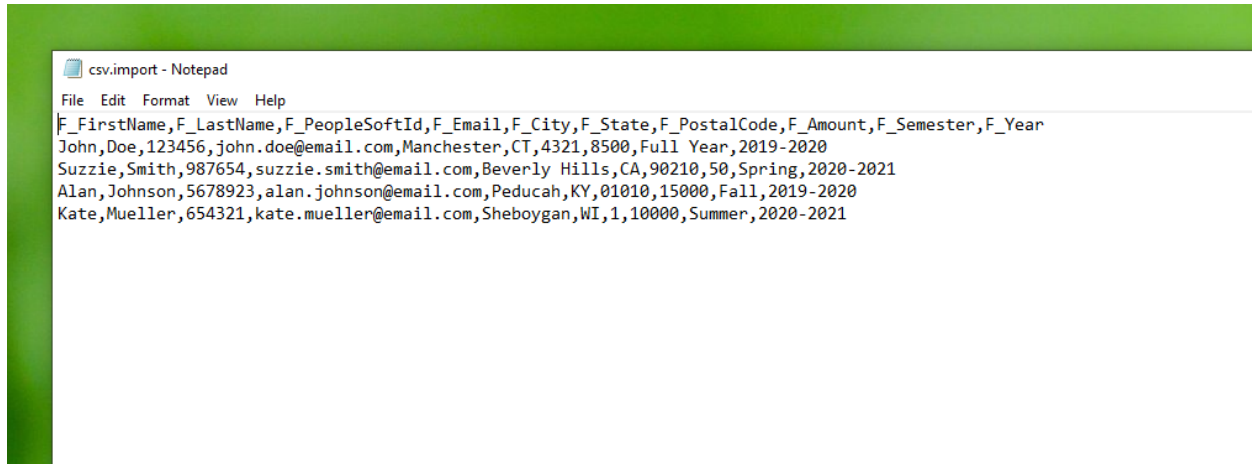*A sample file may be found on financialaid.uconn.edu/faculty-and-staff/.*

1.) Using an excel file, use the following headings under the appropriate columns.

	A	B	C	D	E	F	G	H	I	J
1	F_FirstName	F_LastName	F_PeopleSoftId	F_Email	F_City	F_State	F_PostalCode	F_Amount	F_Semester	F_Year

2.) Enter the recipients' information using the format below.

John	Doe	1234560	john.doe@email.com	Manchester	CT	4321	8500	Full Year	2019-2020
Suzzie	Smith	9876540	suzzie.smith@email.com	Beverly Hills	CA	90210	50	Spring	2020-2021
Alan	Johnson	5678923	alan.johnson@email.com	Peducah	KY	1010	15000	Fall	2019-2020
Kate	Mueller	6543210	kate.mueller@email.com	Sheboygan	WI	1	10000	Summer	2020-2021

3.) Once your spreadsheet is complete, it will then need to be opened using a text editor like NotePad or WordPad.

4.) See below for an example of how the data will look in a text editor.

```
csv.import - Notepad
File   Edit   Format   View   Help
F_FirstName,F_LastName,F_PeopleSoftId,F_Email,F_City,F_State,F_PostalCode,F_Amount,F_Semester,F_Year
John,Doe,123456,john.doe@email.com,Manchester,CT,4321,8500,Full Year,2019-2020
Suzzie,Smith,987654,suzzie.smith@email.com,Beverly Hills,CA,90210,50,Spring,2020-2021
Alan,Johnson,5678923,alan.johnson@email.com,Peducah,KY,01010,15000,Fall,2019-2020
Kate,Mueller,654321,kate.mueller@email.com,Sheboygan,WI,1,10000,Summer,2020-2021
```

5.) Select all the text, copy, and then paste into the CSV upload box in the Scholarship Disbursement Request form, and submit.

Approving a Scholarship as the Authorized Signatory

1.) Once a scholarship disbursement request is submitted, the Authorized Signatories on the account will receive email notifications informing them to log into the system to review and approve/deny the request.

2.) The Authorized Signatory should review the Scholarship Recipients listed to ensure the request meets the awarding criteria and that sufficient funding is available to make the award.

3.) Once reviewed, the Signatory can either select **Approve All Recipients, Deny All Recipients**, or can choose to approve only a select few submitted by ✎ to the right of the Scholarship Recipients.

4.) If the Signatory selects **Approve All Recipients**, it will now indicate that the students have been Signatory Approved.

* Scholarship Recipients

number of recipients: 2

Last Name	First Name	PeopleSoft ID	Amount	Disbursement Semester	Academic Year	Signatory Approved	OSFAS Processed	Cancelled	
Doe	John	0123456	$8,500.00	Full Year	2019-2020	Yes			✎

  a. *If the Signatory selects Deny All Recipients, it will result in a No under Signatory Approved. If the recipients are denied, the Signatory should then select Return to Requestor to Edit under the Account Signatory Review Box, provide comments as to why it is being returned, and the select Return to Requestor at the bottom of the page.*

* Scholarship Recipients

number of recipients: 2

Last Name	First Name	PeopleSoft ID	Amount	Disbursement Semester	Academic Year	Signatory Approved	OSFAS Processed	Cancelled	
Doe	John	0123456	$8,500.00	Full Year	2019-2020	No			✎

5.) Once the recipients are approved, the Signatory should select **Send to Financial Aid for Processing** and then check the acknowledgment box confirming that the disbursement is consistent with all applicable University and/or Foundation policies and procedures and sufficient funds are available for this disbursement.

6.) Select **Send to OSFAS for processing**.

Account Signatory Review

Foundation Account Number: 28070

Authorized Signatories: Carrie E Fernandes, Jason W Card

Please Note: All students listed in the **Scholarship Recipients** table must be adjudicated before this Disbursement Request can be sent to Financial Aid for additional processing.

The total disbursement amount of this request is $10,000 or greater and requires authorization from the account's Primary Signatory.

* Signatory Review Status
- ◉ Send to Financial Aid for Processing
- ○ Return to Requester to Edit

* Time Stamp

Date	Time
2/11/2020	12:50 PM

Review Comments

☑ To the best of my knowledge, I certify that the above request for disbursement is consistent with all applicable University and/or Foundation policies and procedures and sufficient funds are available for this disbursement.

ACTIVITY LOG

Actor	Action	Time	Comments
Fernandes, Carrie	Create Disbursement Request	2/11/2020, 11:58:08 AM	
Fernandes, Carrie	Create Disbursement Request	2/11/2020, 11:58:08 AM	

[Send to OSFAS] [Return to Requester]

How to Create a New Scholarship

This form should be used when a new scholarship needs to be created in order to award a student a scholarship. This may apply when there is a new KFS or Foundation #, or when a new scholarship needs to be created for an existing KFS #.

1.) Select the **Appropriate Year** (Academic Year) that you would like to begin awarding the scholarship for.
2.) Under **Account Type**, select either **UConn Accounting Office KFS #** or **UConn Foundation**, depending on the scholarship funding source.
   a. Enter in the remaining information.
3.) Select the **Academic Careers** you wish to designate eligible to receive this type of scholarship.
4.) Use the **Comments** box to provide additional information about the new scholarship.
   a. *If the scholarship should NOT apply toward a student's tuition and fee bill and instead, be refunded directly to the student, please utilize the Comments box for this purpose.*
5.) **Submit Request**.
6.) Once the scholarship has been created by the OSFAS, you will receive an email notification. Upon this email notification, please being the Scholarship Disbursement Request process.

OSFAS SCHOLARSHIP SYSTEM
SCHOLARSHIP CREATION REQUEST

Scholarship Details

Instructions: Please use this form to set up a new account number. Once this form is submitted to the Office of Student Financial Aid Services and approved, an **Item Type** will be created and you will be able to submit scholarship disbursements for processing.

* **Year**

2020/2021

* **Account Type**
- ◉ UConn Accounting Office KFS #
- ◯ UConn Foundation

* **UConn Accounting Office KFS #**

1234567

7 digits - e.g. 6340750

* **Official Scholarship Account Name**

General Financial Aid Scholarship

The Official Scholarship Account Name will appear on the student fee bill

Academic Careers eligible to receive this award
- ☑ Graduate
- ☑ Undergraduate
- ☑ Pharm-D
- ☑ Ratcliffe Hicks
- ☐ Non-Degree

Comments
Please use this comment box for any special instructions needed such as "Please set up to not hit outstanding charges on a student's bill"

Submit Request