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

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

![Add Entry](image1)

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](image2)

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

![Requestor Details Image]

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 Image]
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”.

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

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
</tr>
</thead>
<tbody>
<tr>
<td>F_FirstName</td>
<td>F_LastName</td>
<td>F_PeopleSoftId</td>
<td>F_Email</td>
<td>F_City</td>
<td>F_State</td>
<td>F_PostalCode</td>
<td>F_Amount</td>
<td>F_Semester</td>
<td>F_Year</td>
</tr>
</tbody>
</table>

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

<p>| | | | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>John</td>
<td>Doe</td>
<td>1234560</td>
<td><a href="mailto:john.doe@email.com">john.doe@email.com</a></td>
<td>Manchester</td>
<td>CT</td>
<td>4321</td>
<td>8500</td>
<td>Full Year</td>
<td>2019-2020</td>
</tr>
<tr>
<td>Suzie</td>
<td>Smith</td>
<td>987654</td>
<td><a href="mailto:suzanne.smith@email.com">suzanne.smith@email.com</a></td>
<td>Beverly Hills</td>
<td>CA</td>
<td>90210</td>
<td>50 Spring</td>
<td>2020-2021</td>
<td></td>
</tr>
<tr>
<td>Alan</td>
<td>Johnson</td>
<td>5678923</td>
<td><a href="mailto:alan.johnson@email.com">alan.johnson@email.com</a></td>
<td>Pecah</td>
<td>KY</td>
<td>1010</td>
<td>15000 Fall</td>
<td>2019-2020</td>
<td></td>
</tr>
<tr>
<td>Kate</td>
<td>Mueller</td>
<td>6543210</td>
<td><a href="mailto:kate.mueller@email.com">kate.mueller@email.com</a></td>
<td>Sheboygan</td>
<td>WI</td>
<td>1</td>
<td>10000 Summer</td>
<td>2020-2021</td>
<td></td>
</tr>
</tbody>
</table>

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.

```
John,Doe,1234560,john.doe@email.com,Manchester,CT,4321,8500,Full Year,2019-2020
Suzie,Smith,987654,suzanne.smith@email.com,Beverly Hills,CA,90210,50 Spring,2020-2021
Alan,Johnson,5678923,alan.johnson@email.com,Pedua,KY,1010,15000 Fall,2019-2020
Kate,Mueller,6543210,kate.mueller@email.com,Sheboygan,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.
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.

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**.
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

[Image of Scholarship Details form]

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

* Official Scholarship Account Name
  General Financial Aid Scholarship

The Official Scholarship Account Name will appear on the student's 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.”