

# Scholarship Administrative Support Training

Presented by: Office of Financial Aid

Anita Brown

Assistant Director for Scholarships

Office of Financial Aid

[ANITABROWN@USF.EDU](mailto:ANITABROWN@USF.EDU)

# Introduction

Office of Financial Aid (OFA) facilitates scholarship administration:

- Application
- Awarding
- Disbursement
- Reconciliation processes
- Renewal

The screenshot shows the website for the University of South Florida's Office of Financial Aid. The header includes the university's name, navigation links for MyUSF and Directory, and a search icon. Below the header, the main title 'OFFICE OF FINANCIAL AID' is displayed alongside a 'CONTRIBUTE TO OUR FUTURE' button. A secondary navigation bar lists links for HOME, GET STARTED, AID TYPES (with a dropdown arrow), FORMS, KNOW THIS!, and CONTACT US. The main content area features a large green graphic on the left with the text 'HOW TO COMPLETE YOUR FAFSA' and a video thumbnail of a man in a green polo shirt. To the right of the video are four informational sections: 'COST OF ATTENDANCE' (Tuition, Fees, Housing, etc.) with a dollar sign icon, 'SCHOLARSHIPS' (Dates and Resources) with a graduation cap icon, 'STUDY ABROAD' (Know Your Aid Options) with a globe icon, and 'DON'T LOSE YOUR AID' (Grades Impact Your Aid) with a clock icon. At the bottom, a row of four service tiles is provided: 'APPLY FOR AID' (Complete Your FAFSA) with a laptop icon, 'OASIS' (Check Your Aid Status) with an information icon, 'CHECKLIST' (Financial Aid Timeline) with a clipboard icon, and 'COST CALCULATOR' (Better Budget = Less Stress) with a calculator icon.

UNIVERSITY OF SOUTH FLORIDA MyUSF Directory

**OFFICE OF FINANCIAL AID** CONTRIBUTE TO OUR FUTURE

HOME GET STARTED AID TYPES FORMS KNOW THIS! CONTACT US

**HOW TO COMPLETE YOUR FAFSA**

**COST OF ATTENDANCE**  
Tuition, Fees, Housing, etc.

**SCHOLARSHIPS**  
Dates and Resources

**STUDY ABROAD**  
Know Your Aid Options

**DON'T LOSE YOUR AID**  
Grades Impact Your Aid

**APPLY FOR AID**  
Complete Your FAFSA

**OASIS**  
Check Your Aid Status

**CHECKLIST**  
Financial Aid Timeline

**COST CALCULATOR**  
Better Budget = Less Stress

# Topics

Scholarship Support  
Calendar

Cost of Attendance  
and Stacking Policy

Payment Policy

New/Update Fund  
Code Forms  
Reminders

Terms & Conditions  
(T&C) and Thank  
You Letter (TYL)  
Reminders

Payment Procedures  
& Forms

Scholarship  
Administration  
Reports Review

Additional Updates

Questions and  
Answers

# Scholarship Processing Definitions and Policy

- Scholarship Support Calendar
- Cost of Attendance
- Stacking Policy

# 2020-2021 Scholarship Support Calendar

Student Type	Application Deadline	Payment Request Deadline
New Freshman	February 1	February 14
New Transfer and Graduate Students	February 28	March 13
Continuing Students & Renewals	May 22	June 5

## Scholarship Support Calendar Student Benefits



Scholarship leveraging,  
recruitment, and retention



Financial aid tuition  
deferments and USF  
Bookstore Advance Purchase  
Program (BAPP)



Reducing student loan debt



Reporting tools to facilitate  
scholarship administration

# Cost of Attendance (COA) and Financial Aid Award Packages



COA - includes average tuition & fees, housing, meals, books & supplies, transportation and miscellaneous expenses.



A package of financial aid includes all aid awarded to a student (e.g. grants, scholarships, loans, work study, waivers, etc.)



Financial aid packages are intended to meet the student's need which is calculated by **COA-Expected Family Contribution (EFC from the FAFSA)= Gross Need.**



The USF packaging guidelines restrict the amount of equity funds (gift aid) – only applies to OFA  
Need Based Grants

87% of the COA for on/off campus  
65% of the COA for living at home

# Cost of Attendance

## 2019-20 STUDENTS LIVING ON CAMPUS

### Undergraduate Students

	Full-Time Tuition and Fees*	Housing and Meals	Books and Supplies	Other Expenses**	Total
Florida Resident	\$6,410	\$11,836	\$1,100	\$4,100	\$23,446
Out-of-State Resident	\$17,324	\$11,836	\$1,100	\$4,100	\$34,360

### Graduate Students

	Full-Time Tuition and Fees*	Housing and Meals	Books and Supplies	Other Expenses**	Total
Florida Resident	\$7,840	\$12,858	\$900	\$4,100	\$25,698
Out-of-State Resident	\$15,864	\$12,858	\$900	\$4,100	\$33,722

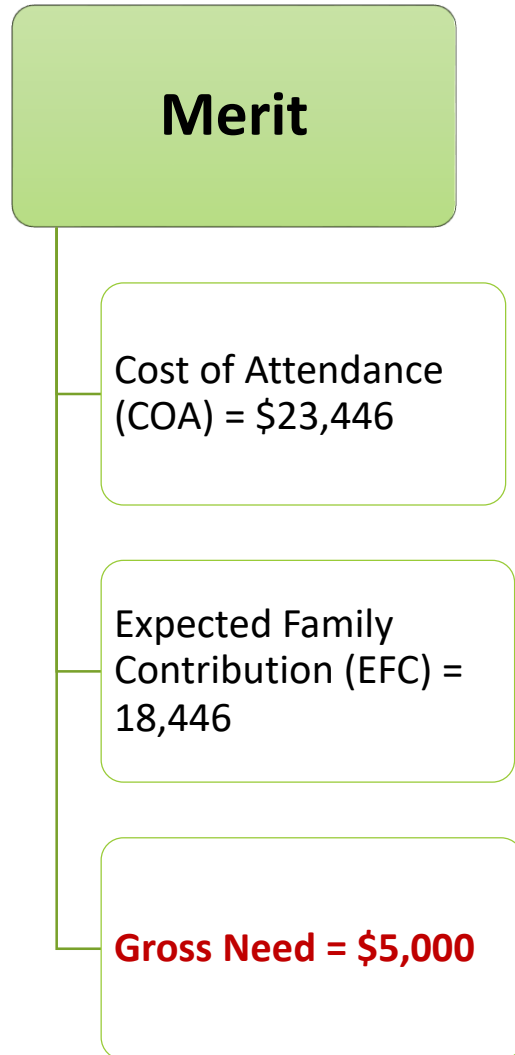
- Provide estimated expenses for a full-time student based on residency and living arrangements.
- Reflects Tampa Campus rates: undergraduate tuition - 30 credit hours; graduate tuition - 18 credit hours.
- The amounts are used in awarding financial aid funds.
- These are estimates, so if students enroll less than full time, the amounts will be reduced to reflect lower costs.



# Scholarship Awarding – Merit and Need-Based

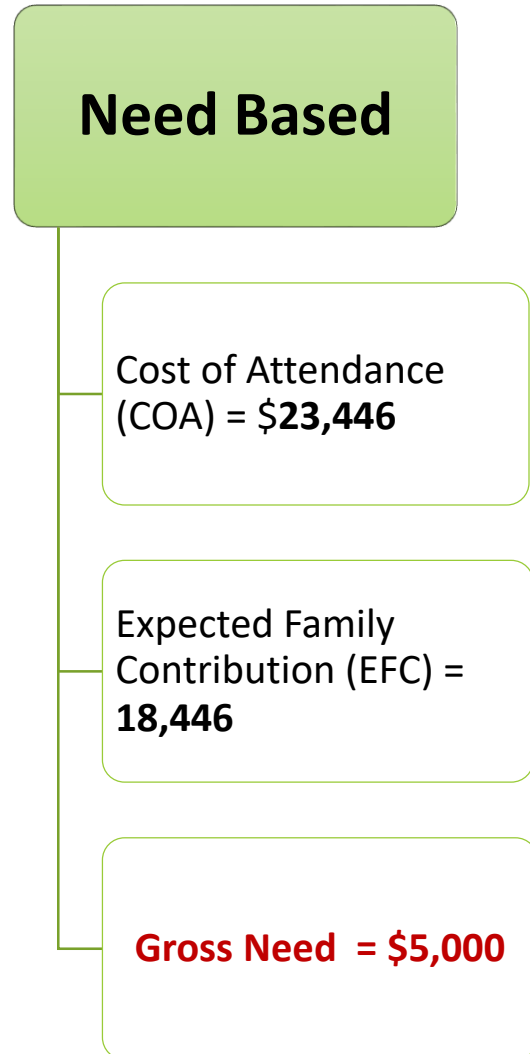
- Merit based scholarships are based on some form of academic achievement
  - Test scores
  - GPA
  - Valedictorians
- Need-based scholarship is based on student need.
  - FAFSA is required
  - EFC from FAFSA should be used
  - Unmet need can change
  - Keep list of alternative students

# Merit-Based Scholarship Example



- Scholarship offered amount=**\$6,000**
- “Need” is not a limitation
- What are your options?
  - ✓ Award the student eligible amount
  - ✓ Stacking policy may require award swap of funds
  - ✓ Other awards may have some sort of a COA or equity cap as part of their terms and conditions (T&C)
- Coming soon...scholarship merit total in case COA is an issue for the award you are administering.

# Need-Based Scholarship Example



- Scholarship offered amount=**\$6,000**
- Only able to receive: **\$5,000** in need-based aid.
- What are your options?
  - ✓ Award the student **\$5,000**
  - ✓ Select another student if you must award full amount.
  - ✓ Stacking policy may require award swap of funds.
  - ✓ Other awards may have some sort of a COA or equity cap as part of their terms and conditions (T&C).
- Awarding advice: Develop an EFC range for awarding need-based scholarships. Max Pell eligible EFC is **5711**.

**\*\*Additional awards will effect unmet need\*\***

## Scholarship Payment via OFA

- Creating/Updating Financial Aid Fund Codes
- Terms and Conditions (T&C) and Thank You Letter (TYL)
- Award Messages
- Payment Request and Cancellation/Reduction Forms

# Scholarship Payment Policy

- To ensure compliance with all federal and state regulations, all scholarship awards must be disbursed through the student's University account.
- Students must be enrolled for the term of disbursement.
- Scholarship or grant funds will not disburse directly to students or to a 3<sup>rd</sup> party on behalf of a student.
  - See process for [Scholarship, Fellowship, Tuition Waiver/Remission and Stipend Payments](#).
- [Financial Aid Payments](#) begin after drop/add each term.

# Scholarship Payment Process

## New/Update Fund Code

- Enrollment requirements
  - Establish Terms and Conditions, Thank You Letter
  - Awarding and Disbursement Rules

## Payment Process

- Awarding via payment request form
  - Disbursement
  - Cancellation/Reduction

## Fund Reconciliation using Scholarship Administration Reports

- Awarding
  - Disbursement
  - Reconciliation

# Scholarships Forms Page

## Scholarship Administration

Office of Financial Aid / Scholarship Administration / Scholarship Forms

SCHOLARSHIP DEADLINES

ADMINISTRATIVE GUIDES

AWARDSPRING

SCHOLARSHIP FORMS

REPORTS

SCHOLARSHIP TEAM CONTACTS

## SCHOLARSHIP FORMS

Authorized USF staff should submit USFAS Scholarship forms as attachments via the AA USF ASPFR ([usfaspfr@usf.edu](mailto:usfaspfr@usf.edu)) email account.

- Only emails sent from authorized USF staff that include completed USFAS Scholarship forms and come from a usf.edu email account will be processed by this email box.
- Emails sent directly to USFAS staff will not be processed.
- Awarding units are encouraged to use Outlook "Options"-> Request a Delivery Receipt and/or Request a Read Receipt for each email sent.
- Emails w/attached forms will be reviewed for processing at least once a day beginning at 8:00AM.
- There will be no replies to emails sent to the [usfaspfr@usf.edu](mailto:usfaspfr@usf.edu) email account other than the automated Outlook receipts.
- Questions or concerns should continue to be addressed to USFAS staff using the "Contact Us" information listed below.
- If your unit does not have access to a scanner, please send requests by campus mail or courier.

*The USFAS scholarship request forms CANNOT BE FAXED*

- New Fund Code Form (2019-20) (2020-21)
- Update Fund Code Form (2019-20) (2020-21)
- Payment Request Form (FASP) (2019-20) (2020-21)
- Payment Request Form (SU) (2019-20)
- Scholarship Cancellation/Reduction Form (2019-20) (2020-21)
- Renewable Spending Plan

# Completing the New Fund Code Form

## Instructions:

- Follow all the instructions that are listed at the top of the form.
- Processing can take (5-8) business days.

## Section A: Establishing the scholarship name

- **Program Long Name** will appear via OASIS web.
- **Program Short Name** will appear via the student's Financial Aid Award Letter.

## Section B: Source of Funds

- **FAST Chart Fields** are for non-USF Foundation scholarships/grants only
- **Foundation Accounts ONLY**: Provide the six-character foundation account number associated with the program/scholarship.

## Section C, D, and E: Accountable Officer, Administrative Name, and Awarding Unit Information

- **Accountable Offer** – Authorized signer
- **Administrative Officer** – USF contact person
- **College/Department/Awarding Unit** – Area responsible for scholarship

### 2019-2020 USFAS New Fund Code Form - Scholarships/Grants

#### INSTRUCTIONS:

1. Fill in all information required in parts A - G. Incomplete forms will be returned.
2. If this is a USF Foundation fund, scan and e-mail to desireev1@usf.edu. If this is a non-USF Foundation fund, scan and email to usfaspr@usf.edu.
3. Please allow 5 business days for processing.

A. Program Name - The name of the program as it should appear to students via OASIS web (Program Long Name) and their Financial Aid Award Letter (Program Short Name).

Program Long Name:

Program Short Name(30 Character Limit):

#### B. Source of Funds

1. FAST Chart Field (For non-USF Foundation scholarship/grants only.)

Business Unit:	Operating Unit:	Department:	Fund Code:	Account:	Product:	Initiative:	Project:
				64000 ▼			

2. ☐ E&G ☐ Private ☐ Federal ☐ State ☐ Other

3. ☐ National Institute Of Health

4. ☐ National Science Foundation

5. Six character foundation account number (if applicable):

C. Accountable Officer Name:	Employee ID:	E-Mail	Mail Point:	Phone:



# Completing the USFAS New Fund Code Form (cont.)

## Section F: Awarding and Disbursement Rules

- Minimum enrollment to be paid
- Maximum amount per year/student
- FAFSA required = Yes, if need-based
- Terms and conditions (non-renewable/renewable)
- Thank You Letter (TYL) Required

## Section G: Scholarship and Grants Uncashed Refund Check Policy

- Uncashed refund check, what should our office do with those funds?
- Students should sign up for eDeposit or ensure their personal information is updated in OASIS.

## Section H: Certification

- Signature for Accountable Officer
- Signature for USF Foundation (if applicable)
  - Decision provided for who will monitor need

**F. Awarding and Disbursement Rules**

1. Minimum Enrollment  
 Fall: ☐ Full Time ☐ 3/4 Time ☐ 1/2 Time ☐ At Least 1 Active USF Credit Hour  
 Spring: ☐ Full Time ☐ 3/4 Time ☐ 1/2 Time ☐ At Least 1 Active USF Credit Hour  
 Summer: ☐ Full Time ☐ 3/4 Time ☐ 1/2 Time ☐ At Least 1 Active USF Credit Hour  
 \* Must be actively enrolled in at least one USF credit hour at the time of disbursement.

2. Award Maximum Amount Per Year Per Student:

3. Need based (FAFSA is required): ☐ Yes ☐ No

4. Terms and Conditions Required: ☐ Yes ☐ No  
**T&C text must be approved by the accountable officer and submitted to Anita Brown (anitabrown@usf.edu) when this form is submitted and prior to payment requests being submitted.**

Select The Type of Terms & Conditions

5. Thank You Letter Required: ☐ Yes ☐ No  
 Terms and Conditions must be required if Thank You Letter if required.

6. For additional disbursement rules (GPA requirements, setting up fund messages in OASIS, assistance with renewal criteria, etc.), please contact Anita Brown, Assistant Director, by email [anitabrown@usf.edu](mailto:anitabrown@usf.edu) or by phone-813-974-7228.

---

**G. Scholarship/Grant Uncashed Refund Check Policy:**  
 When the payment from this fund results in the student receiving a refund check and the student does not cash the refund check, please indicate what our office should do with the uncashed funds:

☒ Please return any uncashed funds to the scholarship fund. (Please note: Departments will have to reissue funds using a payment request.)  
☐ Please allow any uncashed funds to be remitted to the State of Florida Abandoned Property. (Please note: Student has up to (5) years to reclaim these funds from the state. FS 717.105)

---

**H. Certification**  
 I hereby certify that the above information is true and complete to the best of my knowledge.

Accountable Officer Name (Printed) \_\_\_\_\_

Accountable Officer Signature/Date \_\_\_\_\_

For USF Foundation Scholarship Office Use ONLY:  
 This fund will be monitored for need by:

☐ Not Required ☐ USF Foundation ☐ USFAS-Financial Aid

\_\_\_\_\_  
 USF Foundation Scholarship Administrator Signature/Date

# Additional Requirements for Fund Codes



## Terms and Conditions (T&C) and Thank You Letters (TYL):

Posted as a requirement in OASIS for each award  
 T&C requires acceptance in OASIS for award to pay  
 TYL must be submitted and tracked in order to pay  
**Terms and conditions text must be submitted when  
 New or Update Fund Code is submitted**



## When should a T&C be assigned to fund?

Renewable scholarships  
 Thank you letter is required  
 Specific requirements- GPA,  
 majors, earned hours



## What is an award message?

Available when T&C not required  
 Provide information related to  
 enrollment requirements, thank  
 you letter, major requirement, etc.  
 Will **not** prevent disbursement in  
 Banner

# USFAS Update Fund Code Use

- Modify program scholarship/grant name
- Update source or account information
- Add or remove Terms & Conditions/Thank You Letters Requirements
- Create or adjust awarding and disbursement rules, if any, per the donor agreement

## 2019-2020 USFAS Update Fund Code Form - Scholarships/Grants

### INSTRUCTIONS:

1. Fill in all information required in parts A - G. Incomplete forms will be returned.
2. If this is a USF Foundation fund, scan and e-mail to [desireev1@usf.edu](mailto:desireev1@usf.edu). If this is a non-USF Foundation fund, scan and email to [usfaspr@usf.edu](mailto:usfaspr@usf.edu).
3. Please allow 5 business days for processing.

**A. Program Name** - The name of the program as it should appear to students via OASIS web (Program Long Name) and their Financial Aid Award Letter (Program Short Name).

Current Program Name:

New Program Long Name  
(view in OASIS):

New Program Short Name  
(30 character limit):

Financial Aid Fund Code:

### B. Source of Funds

1. FAST Chart Field (For non-USF Foundation scholarship/grants only.)

Current:

Business Unit: Operating Unit: Department: Fund Code: Account: Product: Initiative: Project:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	64000 ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------	----------------------	---------	----------------------	----------------------	----------------------

New:

Business Unit: Operating Unit: Department: Fund Code: Account: Product: Initiative: Project:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	64000 ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------	----------------------	---------	----------------------	----------------------	----------------------

2. ☐ E&G ☐ Private ☐ Federal ☐ State ☐ Other

# USFAS Payment Request Form and Procedures

1. Complete the scholarship [Payment Request Form](#)
2. Do not forget the special instructions!
  - Enrollment exceptions
  - Disbursement requests
3. Must be signed by an Accountable Officer.
4. Scan and email the form as an attachment to scholarship email inbox-AA USF ASPFR ([usfaspfr@usf.edu](mailto:usfaspfr@usf.edu))
5. Awards are normally posted within 10 business days of receipt of the completed form.
6. Colleges/Departments should monitor awards and payments from the OFA reconciliation reports.

## USFAS Payment Request Form - Scholarships/Grants

2019-2020

### Instructions:

1. Use this form to submit scholarship/grant awards to be processed in OASIS. Allow 10 business days for processing.
2. Submit one request per fund. Each request is considered authorization to disburse additional funds.
3. Write/Type "Unmet Need" if USFAS is to determine the award amount within the min/max established for this fund.
4. Scan and email to [usfaspfr@usf.edu](mailto:usfaspfr@usf.edu). Incomplete forms will not be processed.
5. Use the web based "Fund Reconciliation Report" to monitor/reconcile your request for each student.

*Required for completion	
A. *College/Department:	
*Scholarship/Grant Fund Name:	
*Financial Aid Fund Code:	
*Foundation Fund Number (if applicable):	

B. *Recipient (Last Name, First Name)	*UID#	Fall 2019 Amount	Spring 2020 Amount
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
		\$0.00	\$0.00

C. Special Instructions:			
*Initiator's Name (Printed):	*Phone:	*Mail Point:	*E-Mail:
*Accountable Officer (Printed):		*Accountable Officer Signature:	*Date:
*Accountable Officer E-Mail:			
*The Initiator and Accountable Officer have made this award(s) in accordance with the fund purpose and donor restrictions.			

**Note: If you have a large number of students to award 60+, then please contact Anita Brown ([anitabrown@usf.edu](mailto:anitabrown@usf.edu)) before you complete the payment request(s).**


# Cancellation/Reduction Procedures

- Use the [Cancellation/Reduction Form](#) to reduce or cancel a fund by term.
- Do not forget the special instructions!
- Scan and email the form as an attachment to scholarship email inbox-AA USF ASPFR ([usfaspfr@usf.edu](mailto:usfaspfr@usf.edu)).
- Use the reports to monitor/reconcile your requests for each student.


USFAS Cancellation/Reduction Form - Scholarships/Grants					2019-2020
<b>Instructions:</b>					
1. Use this form to cancel/reduce scholarship/grant awards. Allow 10 business days for processing.					
2. Use the web based "Fund Reconciliation Report" to monitor/reconcile your request for each student.					
3. Scan and email <a href="mailto:usfaspfr@usf.edu">usfaspfr@usf.edu</a> . Incomplete forms will not be processed.					
*Required for completion					
A.	*College/Department:				
	*Scholarship Fund Name:				
	*Financial Aid Fund Code:				
	*Foundation Fund Number: (if applicable)				
B.	Recipient	UID#	Amount Cancel or Reduce - Fall	Amount Cancel or Reduce - Spring	Amount Cancel or Reduce - Summer
1			\$ -	\$ -	\$ -
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
<b>Totals</b>			<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Special Instructions:</b>					
C.					
	*Initiator's Name (Printed):	*Phone:	*Mail Point:	*E-Mail:	
	*Accountable officer (Printed):		*Acct. Officer/Authorized Signer:		*Date:
	*Accountable Officer Email:				

## Verifying an Accountable Officer (AO)

## USF Foundation (Banner ALUM)

Fund Data Form Text FZAFTXT 2008091401 (ALUM)			
		<b>Key Block</b> Fund Code <input type="text"/> COAS <input type="text"/>	
<b>Fund Data</b>			
Submitted By	<input type="text" value="Connie Mitchell"/>	Coas	<input type="text" value="F"/>
Date Submitted	<input type="text" value="22-FEB-2008"/>	Fund Code	<input type="text"/>
Last Updated By	<input type="text" value="TMARLOWE"/>	Earnings Fund Code	<input type="text"/>
		Last Updated Date	<input type="text" value="30-JAN-2020"/>
College Unit	<input type="text" value="USF Tampa Campus Scholarship"/>		
Fund Type	<input type="text" value="Operating"/>		
Fund Name	<input type="text"/>		
Purpose	<input type="text" value="To offer full, four-year scholarship for four (4) students at an"/>		
Admin Data	<input type="text"/>		
Initial Transaction	<input type="text" value="Other"/>	Transfer From	<input type="text"/> Date Match Eligible <input type="text" value="N"/>
Initial Amt	<input type="text"/>	Agreement Ind	<input type="text" value="Y"/>
Desg Cfae Code	<input type="text" value="STUFN"/>	Earnings Cfae Code	<input type="text"/>
Desg Group Code			<input type="text" value="TK"/>
Desg Type Code	<input type="text" value="SO"/>	Earnings Type Code	<input type="text"/>
Desg Dept Code			<input type="text" value="SRO"/>
Fvpp Name	<input type="text" value="Joel Momberg (L1)(No Authority)"/>	Date	<input type="text" value="01-NOV-2019"/>
Fvp1 Name	<input type="text" value="Rob Fischman (L1)"/>	Date	<input type="text" value="18-JUN-2008"/>
Fvp2 Name	<input type="text" value="Noreen Segrest (L1)"/>	Date	<input type="text" value="12-AUG-2008"/>
Fd01 Name	<input type="text"/>	Date	<input type="text"/>
Fd02 Name	<input type="text"/>	Date	<input type="text"/>
Fd03 Name	<input type="text"/>	Date	<input type="text"/>
Fdvo Name	<input type="text" value="Luz Randolph (DO)(No Authority)"/>	Date	<input type="text" value="17-JAN-2020"/>
Fadm Name	<input type="text" value="Kristi Larabee (FA)"/>	Date	<input type="text" value="18-FEB-2019"/>

## FAST (Accountable Officers)


**UNIVERSITY OF  
SOUTH FLORIDA**

[Favorites](#) | 
 [Main Menu](#) > 
 [USF Menu Items](#) > 
 Search Sig Auth By Chartfield

[New Window](#)
[Help](#)

Sig Auth - Search by Chartfield

Search Criteria

Project   
 Initiative   
 Fund Code   
 Operating Unit and Deptid

Signature Authorization Inquiry Results
 Petersons | Flag | View All | First 1 of 1 Last

Signature Authorization Details

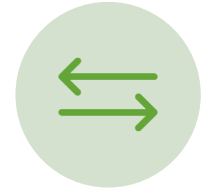
Routing Name	Role Name	User ID	Empl ID	Name	Telephone	Email Drop	Email Address

# Payment Request Process for Study Abroad

- Encourage students who are studying abroad to visit the financial aid office prior to departure.
- Payments must be made for the term the student is travelling and enrolled.
- Use special instruction portion of the payment request to indicate the scholarship is for a study abroad trip – facilitate COA adjustments!
- We contact students to document travel expenses not already included in COA (e.g. air fare, passport, program fees, etc.)
- Study abroad enrollment requirements:
  - OFA Study Abroad Contract is required for exchange and transfer programs
  - Verification of enrollment is required for exchange and transfer programs.
  - Courses must be degree applicable, unless approved by Accountable Officer.



DIRECT (USF  
ENROLLED) PROGRAM



USF EXCHANGE  
PROGRAM



TRANSFER PROGRAM

## Short Term Expense Loan for Study Abroad

- Short term expense loans are available before departure for educational travel abroad expenses.
  - Purchases such as airfare or other related education abroad expenses.
- Available as early as (6) weeks prior to the start of the USF semester.  
Refer students to our office for assistance.
- Students must meet with a financial aid advisor to review this option and eligibility.



# Scholarship Form Reminders

Forms must be sent to the email inbox for processing.

Only emails sent from authorized staff will be processed.

Forms sent directly to OFA staff will not be processed.

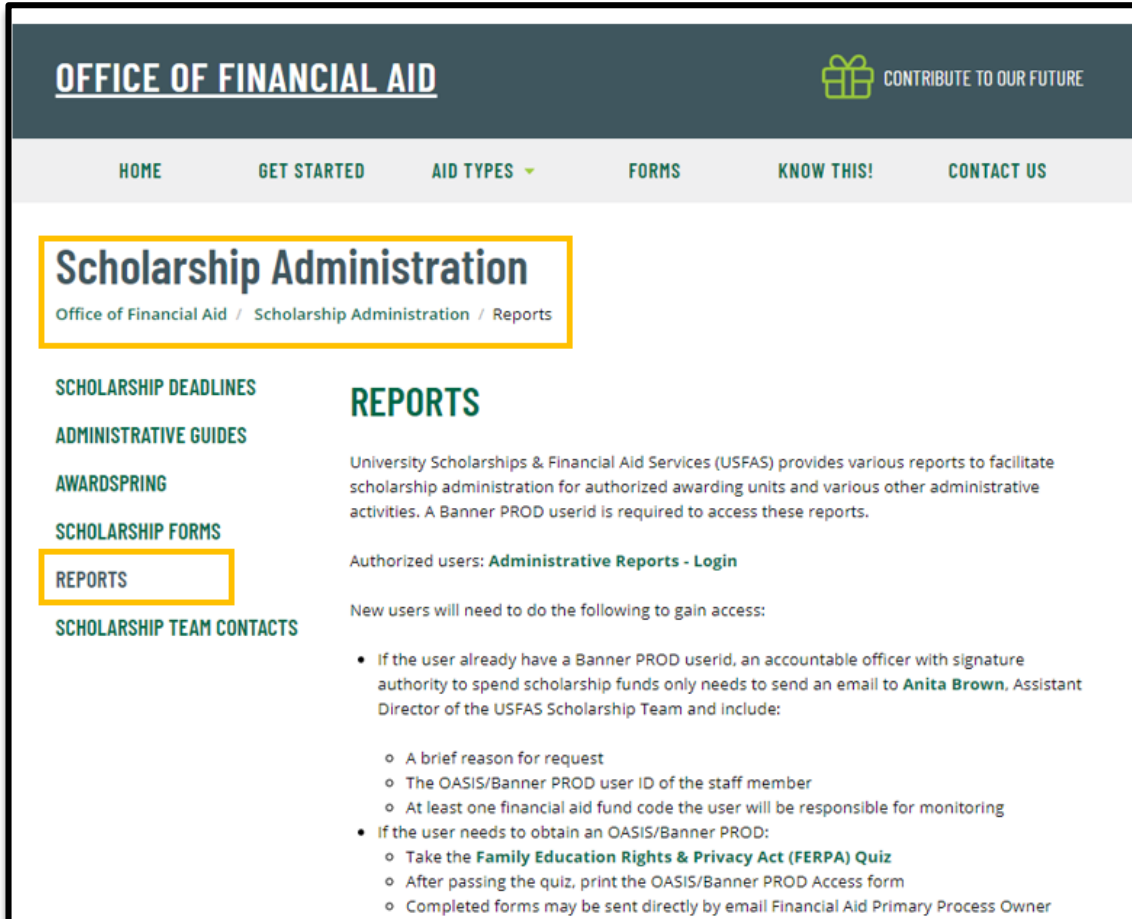
Fund code forms must be processed before payment requests can be submitted.

*NEVER SEND  
DUPLICATES!!!*

## Scholarship Administration Reports

- Access to the reports
- Report types
- Troubleshooting via reports
- Reconciling accounts by fund codes

# How Do I Access the Scholarship Administration Reports?



The screenshot shows the USF Office of Financial Aid website. The header includes the text "OFFICE OF FINANCIAL AID" and a logo with the text "CONTRIBUTE TO OUR FUTURE". The navigation menu includes "HOME", "GET STARTED", "AID TYPES", "FORMS", "KNOW THIS!", and "CONTACT US". The main content area is titled "Scholarship Administration" and includes a breadcrumb trail: "Office of Financial Aid / Scholarship Administration / Reports". The left sidebar contains links for "SCHOLARSHIP DEADLINES", "ADMINISTRATIVE GUIDES", "AWARDSPRING", "SCHOLARSHIP FORMS", "REPORTS" (highlighted with an orange box), and "SCHOLARSHIP TEAM CONTACTS". The main content area is titled "REPORTS" and includes the following text: "University Scholarships & Financial Aid Services (USFAS) provides various reports to facilitate scholarship administration for authorized awarding units and various other administrative activities. A Banner PROD user is required to access these reports." Below this, it states "Authorized users: **Administrative Reports - Login**". It then lists the steps for new users to gain access:

- If the user already have a Banner PROD user, an accountable officer with signature authority to spend scholarship funds only needs to send an email to **Anita Brown**, Assistant Director of the USFAS Scholarship Team and include:
  - A brief reason for request
  - The OASIS/Banner PROD user ID of the staff member
  - At least one financial aid fund code the user will be responsible for monitoring
- If the user needs to obtain an OASIS/Banner PROD:
  - Take the **Family Education Rights & Privacy Act (FERPA) Quiz**
  - After passing the quiz, print the OASIS/Banner PROD Access form
  - Completed forms may be sent directly by email Financial Aid Primary Process Owner

1. Go the [USF Office of Financial Aid web page](#).
2. Select "Scholarships" on the menu.
3. Select "Scholarship Administration" on from the menu.
4. On the [Scholarship Administration](#) page, select Reports.

## How do I get a reports user ID and password?

- Complete the [Family Educational Rights & Privacy Act \(FERPA\)](#) tutorial and quiz and submit an OASIS Banner Request form.
- Accountable Officer then sends email to approve your access.
- The email must include:
  - Your Banner PROD ID
  - At least one financial aid fund code you are responsible for monitoring
  - The brief statement as to why you need access to the reports.

# Reports Overview

- Data is from Banner PROD
  - By aid year and term
  - Student data
  - Fund code data
- List of reports vary by user
- Help text is provided for each report
- Data can be exported to Excel
- Data is a snapshot in time – it can change!

### My Reports

Click on a report below to run it. Results may be downloaded in MS Excel format.

[Change Password](#)

Report	Description
<a href="#">REPORT6</a>	New Student General Scholarship Information via Population Selection
<a href="#">REPORT7</a>	Fund Code Reconciliation by Term
<a href="#">REPORT8</a>	Scholarship Terms & Conditions/Thank You Letters
<a href="#">REPORT9</a>	Fund Reconciliation by Fiscal Year (FY)
<a href="#">REPORT10</a>	Authorized Tuition & Fee Detail Codes by Fund Code
<a href="#">REPORT11</a>	Athletic Fund AR Detail Code Counts
<a href="#">REPORT12</a>	Athletic AR Detail Apporved to Pay
<a href="#">REPORT13</a>	Athlete Tuition Charge Codes by Term
<a href="#">REPORT14</a>	FGMG Recipient
<a href="#">REPORT16</a>	Fund Code Monitor
<a href="#">REPORT17</a>	Fund Code Status by Aid Year
<a href="#">REPORT19</a>	Private Scholarship Fund Code by Aid Year
<a href="#">REPORT20</a>	Continuing Student Scholarship Renewal Informaiton via Population Selection
<a href="#">REPORT21</a>	Multiple Comment Tags by Aid Year
<a href="#">REPORT22</a>	USFAS Scholarship Awarding

[MS Excel](#)

row(s) 1 - 15 of 134 [Next](#) ➤

# REPORT6 - General Scholarship Information for Scholarship Applications

- Banner information about scholarship applicants
- Helps to select students to meet fund purpose.
  - Demographics
  - Academics (e.g. GPA, major, degree, enrollment, etc.)
  - Scholarship Need
- Use application pool to create a population (popsel) of students
- Building a population selection is a manual process – verifies the UID!

REPORT6

**Report Usage**

- This report should be used to list general scholarship information for new students who signed a scholarship application.
- Scholarship applications should contain the students permission to use academic records for scholarship processing.
- The report expects the population of USF ID's to already exist before it runs under the application, creator id, user id and selection selected.
- **AwardSpring** population selections all have "USFAS" as the application and "SRUNION" as the creator/userid. These selections use the following format going forward: "AWARD\_SPRING\_BANNER\_1819".
- The information returned is a "snapshot" from Banner Student Production based on the aid year and admit term and data may change.
- Current student status may not match previous student responses on the scholarship application.
- This report now includes additional columns intended to assist awarding units in determining the amount a student may be awarded w/o affecting existing awards.
  - FAFSA Verification Status (VERIFIED\_STATS) - only used if a FAFSA has been selected for verification to indicate if the verification process has been completed or not.
  - Scholarship Need (SCHL\_NEED) - indicates the amount that may be awarded w/o affecting existing awards.
  - Loan Replacement (LOAN\_REPLACE) - indicates the amount that will replace student loans which may reduce the students loan debt upon graduation.
  - Work Replacement (WORK\_REPLACE) - indicates the scholarship award amount that may replace work study awards.
- Help text is available for each selection item.

**General Scholarship Information via Population Selection Criteria**

Aid Year % ▾

Term Code % ▾

Application FINAID ▾

Creator ID ▾

User ID ▾

Selection % ▾

REPORT6

**Report Usage**

- This report should be used to list general scholarship information for new students who signed a scholarship application.
- Scholarship applications should contain the students permission to use academic records for scholarship processing.
- The report expects the population of USF ID's to already exist before it runs under the application, creator id, user id and selection selected.
- **AwardSpring** population selections all have "USFAS" as the application and "SRUNION" as the creator/userid. These selections use the following format going forward: "AWARD\_SPRING\_BANNER\_1819".
- The information returned is a "snapshot" from Banner Student Production based on the aid year and admit term and data may change.
- Current student status may not match previous student responses on the scholarship application.
- This report now includes additional columns intended to assist awarding units in determining the amount a student may be awarded w/o affecting existing awards.
  - FAFSA Verification Status (VERIFIED\_STATS) - only used if a FAFSA has been selected for verification to indicate if the verification process has been completed or not.
  - Scholarship Need (SCHL\_NEED) - indicates the amount that may be awarded w/o affecting existing awards.
  - Loan Replacement (LOAN\_REPLACE) - indicates the amount that will replace student loans which may reduce the students loan debt upon graduation.
  - Work Replacement (WORK\_REPLACE) - indicates the scholarship award amount that may replace work study awards.
- Help text is available for each selection item.

**General Scholarship Information via Population Selection Criteria**

Aid Year 2021 ▾

Term Code Fall 2020 ▾

Application USFAS ▾

Creator ID ANITABROWN ▾

User ID ANITABROWN ▾

Selection TESTSTUDENTS ▾

**Run Report**

# REPORT6-Instructions

## Banner PROD

- **Go to GLRSLCT:**
  - Application= USFAS
- Selection ID= Description you would like
- Creator ID=Should match your Banner ID
- Cntrl+PgDown
- Selection Description=Description you would like
- Under Selection Description: Click on Manual
- Press F10 to save

## Banner PROD

- **Go to GLAEXTR:**
- Cntrl+PgDown
- Make sure the application, selection ID, creator ID, and user ID match the information you listed on GLRSLCT
- Under ID: Type in the U#'s that you would like to view via Report 6.
- 

## Reports

- **Select Report 6:**
  - Aid year
- Term Code
- Application=USFAS
- Creator ID and User ID= your ID
- Selection=Selection ID from Banner PROD

# REPORT6 OUTPUT

## REPORT6

### General Application Information via Population Selection Parameters

TERM	AID YEAR	APPLICATION ▼	SELECTION	REPORT DATE
202008	2021	USFAS	TESTSTUDENTS	08-MAR-2020

1 - 1

[Re-Run Report](#)


**Awarding Tip: Make sure verification/verified status indicates Completed or Not Applicable for need based scholarships.**

### General Application Information via Population Selection Report Results

USF_ID	LNAME	FNAME	DOB	FAFSA	VERIFIED_STATUS	FGIC	FATHER_GRADE_LEVEL	MOTHER_GRADE_LEVEL	SNGL_PAR	CITZEN	RESID	ETHN	GENDER	BUDGET	EFC	SCHL_NEED
				Y	Non-Verified	-	College or Beyond	College or Beyond	-	P	R	H	F	21530	7447	14914
				Y	Non-Verified	-	College or Beyond	High School	-	C	F	H	M	16760	0	16760

[MS Excell](#)

E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
FAFSA	VERIFIED_STATUS	FGIC	FATHER_GRADE_LEVEL	MOTHER_GRADE_LEVEL	SNGL_PAR	CITZEN	RESID	ETHN	GENDER	BUDGET	EFC	SCHL_NEED	LOAN_REF	WORK_RE
Y	Completed		College or Beyond	College or Beyond		C	F	A	F	21530	0	21530	0	0
Y	Not Applicable		High School	Other/Unknown		C	F	H	F	21530	0	21530	0	0
Y	Not Applicable		High School	Middle School/Junior High		C	F	A	M	21530	0	21530	0	0
Y	Not Applicable		High School	High School		C	F	W	F	43194	0	43194	0	0



# REPORT7- Reconcile Payment Requests

- Fund reconciliation:
  - Students awarded
  - Funds disbursed
  - Student information (campus, class level, majors, email, etc.)
- Troubleshooting:
  - Review unpaid students
  - Enrollment requirement, compare against fund set up.
  - Terms and Conditions and Thank You Letter status

REPORT7

Report Parameters for Fund Reconciliation by Term

REPORT DATE	AID YEAR	TERM CODE	FUND CODE
08-MAR-2020	1920	201908	GU05

1 - 1

Re-Run Report

Report Results for Fund Reconciliation by Term

USF_ID	LAST_NAME	FIRST_NAME	FUND_CODE	AWARD_STATUS	OFFER	OFFER_DATE	AUTH_AMT	PAID_AMT	PAID_DATE	STST	CAMPUS	LEVL	COLL	DEF
			GU05	ASYS	478	24-OCT-2019	-	478	07-NOV-2019	AS	T	UG	BA	PAC
			GU05	ASYS	500	10-DEC-2019	-	500	20-DEC-2019	AS	T	UG	AS	HTY
			GU05	CNCL	-	-	-	-	-	AS	T	UG	EN	EPIE

MS Excell

Run time: 4.78 seconds

D	E	F	G	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
FUND_CODE	AWARD_STATUS	OFFER	OFFER_DATE	PAID_AMT	PAID_DATE	STST	CAMPUS	LEVL	COLL	DEPT_1	MAJR_1	ADMIT_TERM	CLS	RES	TC	TYL	USF_BILL_HRS	USF_ACT_HRS
GU05	ASYS	478	24-Oct-19	478	7-Nov-19	AS	T	UG	BA	PAC	PAC	201808	2S	F	Y	Y	15	6
GU05	ASYS	500	10-Dec-19	500	20-Dec-19	AS	T	UG	AS	HTY	HTY	201608	4R	F	Y	Y	15	15
GU05	CNCL					AS	T	UG	EN	EPIE	EPIE	201908	1F	F	Y		13	13

## REPORT16: Review scholarships information in Banner (PROD)

- Conduct annual financial aid fund code review.
- Update fund code information each year as needed.
- Review for accuracy :
  - Accountable Officer
  - College/department
  - Foundation Account Number or FAST Chart fields
  - FAFSA Required/Need based
  - Enrollment requirements
  - Terms and conditions and thank you letter requirements

### REPORT16

#### Report Parameters for Fund Code Monitor Report

REPORT DATE	AID YEAR
08-MAR-2020	2021

1 - 1

[Re-Run Report](#)

#### Report Results for Fund Code Monitor

FUND_CODE	FUND_TITLE	AR_DETAIL_CODE	FNDTN_ACCT_NO	AWARDING_UNIT	FUND_TITLE_LONG	COLL	DEPT	ACCOUNTABLE_OFFICER
E007	Est. FLPP Differential Waiver	-	-	-	Estimated Florid Pre-paid Tuition Differential Waiver	-	-	-

# Additional Reports!



REPORT50 – Financial aid fund codes that are tied to your units FAST Chart Fields.



Report 51- Financial aid fund codes that are tied to your USF Foundation Fund numbers.



REPORT56 – Reconcile all funds assigned to the user for a term.



REPORT87 - Financial Aid by Campus by College - An unduplicated count of all students paid a scholarship, grant, loan or work study for the aid year.



Report 212 New Student General Scholarship Information via UID Load - Lists general scholarship information for new students who signed a scholarship application.

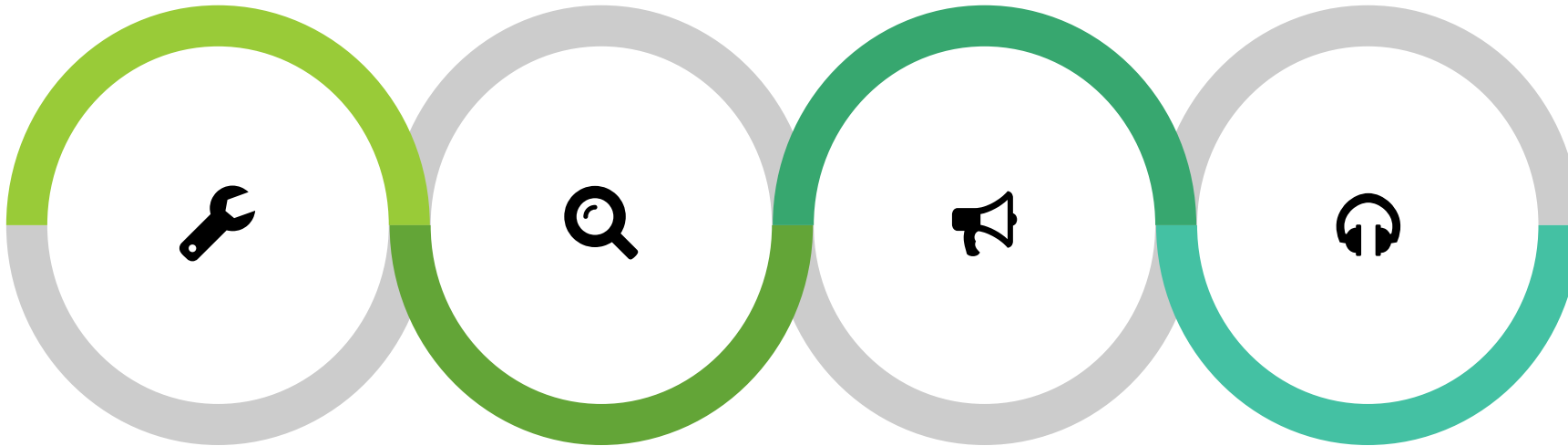


Need something? Send an email with your request to [anitabrown@usf.edu](mailto:anitabrown@usf.edu)

# What's New in Financial Aid???

- Prepared for summer and fall 2020?
  - Registration begins March 30 – requires account balance < \$500
  - Summer 2020 payment request form is available now – **Submission deadline is May 1, 2020 for tuition deferment consideration**
- Reminder: Please adhere to all scholarship payment request deadlines posted on the [Scholarship Administration](#) home page.
- Thank You Letter Email Inbox for USF Staff ONLY -
  - Email student thank you letters here: [SCHTYL@usf.edu](mailto:SCHTYL@usf.edu)
  - Allow up to (5) business days for processing
  - Authorized Staff Only – No student emails

# RESOURCES



## Scholarship Administration web page

Deadlines,  
Administrative Guides,  
Forms, and Reports

## OFA Web Page

COA, FAFSA information,  
Important Dates, and  
Forms

## Scholarship Team

Ask a member of  
the Scholarship  
Team

## OFA Presentations

Review our past  
scholarship related  
presentations.

# Thank You for Coming!

**Anita Brown**

Assistant Director

Office of Financial Aid

University of South Florida

813-974-7228



[www.usf.edu/finaid](http://www.usf.edu/finaid)