myUFl





CHANGING A SCHOLARSHIP AWARD

The following instruction guide will walk you through the process of changing a scholarship award. To perform this function, you must also complete SFA100: Reporting College and Department Scholarships through myTraining. Once you have completed training you may request the follow security roles from your DSA: UF FA EXT EXT AWD UPT and **UF_FA_PP_SFA_INSTITUT_SCHOLAR.** Both roles are required to perform this function.

NAVIGATION

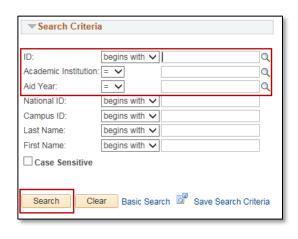
Use the following navigation to navigate to the Add External Awards to Student page:

- 1. Click the NavBar icon
- 2. Click Main Menu
- 3. Click Student Information System
- 4. Click Financial Aid
- 5. Click Awards
- 6. Click External Awards
- 7. Click Add External Awards to Student

SEARCHING FOR STUDENTS

Locate the student to which you wish to add a new scholarship.

- 1. Enter **UFLOR** as **Academic Institution**.
- 2. Enter the appropriate Aid Year.
 - The aid year is the last year of the academic year. For example, if you are considering awarding a scholarship for the Fall, Spring or Summer 2018-2019 academic year, you would enter 2019 as the aid vear.
 - You can use the magnifying glass to locate the appropriate aid year, if desired.
- 3. Enter the student's **UFID** in the **ID** field.
- 4. Click the Search button.



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Look Up Split Code

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Academic Year

Fall Only
Fall and Spring

Description

IA Spring and Summer Spring Only

Spring and Summer

Summer Only

Search Results

Split Code

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ADDING TO AN AWARD

After bringing up the appropriate award type, adding additional disbursements and/or amounts to an already entered award is completed in the Disbursements Table. The entered updates override the previous award data.

- 1. Insert the type of scholarship into the Item Type field.
 - The **Item Type** is a 12-digit number that identifies the scholarship.
 - o If you don't know the item type number of the scholarship you are updating, you can find it by using the magnifying glass and typing in the full or partial name of the scholarship in the **Description** field.
- 2. Enter the **total amount** of the updated award in the **Amount** field.
 - For example, if the previous award was for \$1000.00 and you were adding an additional \$300.00 to the award, the **Amount** field will be \$1300.00
- 3. Always enter 'AY' as the Disbursement Plan.
 - AY stands for Academic Year.
- 4. Enter the appropriate Split Code.
 - o The split code determines how the award disburse across terms.
 - For example, if you want the award to disburse across the fall and spring terms of the academic year, enter 'FS'. If you want the award disbursed across the fall, spring and summer, enter 'AY'.

Enter all the disbursement terms for the updated award in the Disbursements table.



- 5. Enter "1" in the Disb Nbr field.
- 6. Enter "01" in the Disbt ID field.
- 7. Enter the amount of the first disbursement in the Scheduled Award field.
- 8. Enter the term of the first disbursement in the Term field.
- 9. Click the plus sign to add a new row
- 10. Enter "2" in the Disb Nbr field.
- 11. Enter "02" in the Disbt ID field.
- 12. Enter the amount of the second disbursement in the Scheduled Award field.
- 13. Enter the term of the second disbursement in the Term field.
- 14. Click the plus sign to add a new row

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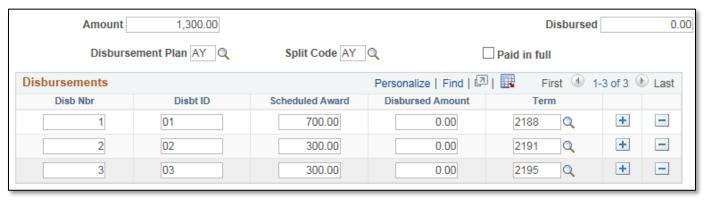
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In this example, we are adding an additional \$300 to a \$1000 award to be disbursed in the summer 2019 (2195) term.

- 15. Enter "3" in the Disb Nbr field.
- 16. Enter "03" in the Disbt ID field.
- 17. Enter the amount of the third disbursement in the Scheduled Award field.
- 18. Enter the term of the third disbursement in the Term field.



REDUCING AN AWARD

It is important to notify the student when anything changes with his/her award, but extremely important if you are reducing or canceling an award. It is critical if you are reducing/canceling an already disbursed award. If an award has already been paid, reducing the award will cause the aid to undisbursed and whatever charges the award had initially paid will become unsatisfied. This can cause serious repercussions such as:

- The student owing money to the university once more
- Late fees
- Being removed from class
- 1. From the Add External Awards tab, insert the type of scholarship into the Item Type field.
 - The **Item Type** is a 12-digit number that identifies the scholarship.
 - o If you don't know the item type number of the scholarship you are updating, you can find it by using the magnifying glass and typing in the full or partial name of the scholarship in the **Description** field.
- 2. Enter the total amount of the reduced award in the Amount field.
 - For example, if the previous award was for \$1000.00 and you are reducing it by \$500.00, the updated Amount field will be \$500.00



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- 3. Always enter 'AY' as the Disbursement Plan.
 - AY stands for Academic Year.
- 4. Enter the appropriate Split Code.
 - o The split code determines how the award disburse across terms.
 - For example, if you want the award to disburse across the fall and spring terms of the academic year, enter 'FS'. If you want the award disbursed across the fall, spring and summer, enter 'AY'.



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NOTE: The entered updates override the previous award data.

5. After the updated award processes, click the View Award Summary tab > Disbursement link to confirm the reduced award amount.



CANCELING AN AWARD

A scholarship award can be completely canceled if needed. Remember, it is critical if you are reducing/canceling an already disbursed award to contact the student prior. If an award has already been paid, canceling the award will cause the aid to be undisbursed and whatever charges the award had initially paid will become unsatisfied. This can cause serious repercussions such as:

- The student owing money to the university once more
- Late fees
- Being removed from class
- 1. From the Add External Awards tab, insert the type of scholarship into the Item Type field.
 - The Item Type is a 12-digit number that identifies the scholarship.
 - If you don't know the item type number of the scholarship you are updating, you can find it by using the
 magnifying glass and typing in the full or partial name of the scholarship in the **Description** field.
- 2. Enter the **0.00** in the **Amount** field.

Look Up Split Code

View 100 First 🕚 1-7 of 7 🕑 Last

Academic Year

Fall and Spring

Summer Only

IA Spring and Summer Spring Only

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Spring and Summer

Fall Only

Description

Search Results

Split Code

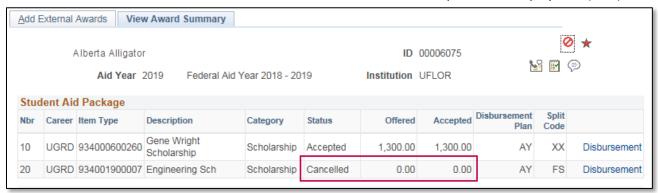
FS

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- 3. Always enter 'AY' as the Disbursement Plan.
 - AY stands for Academic Year.
- 4. Enter the appropriate Split Code.
 - The split code determines how the award disburses across terms.
 - For example, if you want the award to disburse across the fall and spring terms of the academic year, enter 'FS'. If you want the award disbursed across the fall, spring and summer, enter 'AY'.
- 5. Click the **Save** button.
- 6. After the award processes, click the View Award Summary tab.
- 7. Notice the Status field reads "Cancelled" and the Offered and Accepted fields display 0.00 (zero).



FOR ADDITIONAL ASSISTANCE

Technical Issues

The UF Computing Help Desk 352-392-HELP

helpdesk.ufl.edu

Policies and Directives

UF Office of Student Financial Affairs 352-392-1275 | sfa-sis@mail.ufl.edu

<u>sfa.ufl.edu</u>