Financial Aid: External Awards

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Introduction

Objectives and Resources

Introduction

This content is for users in academic departments and administrative offices who will be entering and/or approving External Awards (such as scholarships and stipends). You will learn how to use UAccess Student to award, approve, and manage awards.

Objectives

- Enter award information in the Enter Awards component
- Understand how approvers are assigned.
- Approve an award
- Check award status and review awards
- See the benefits and functionality of the View pages
- Become familiar running queries

Reference Material and Resources

- Office of Scholarships and Financial Aid
  - financialaid.arizona.edu/departments/stipends
- UAccess Community
  - community.uaccess.arizona.edu
  - Join the group for Student: Financial Aid
- 24/7 IT Support Center
  - 247.arizona.edu
- UITS Workshop and Training Team
  - uits.arizona.edu/workshops
Process Flowchart

The flowchart below shows the general workflow for entering and approving/denying awards. The shaded boxes are automatic processes, which occur once the preceding steps are complete.
Identifying Approvers

Procedure

This tutorial walks you through how to identify who the authorized approvers are on an account being used when entering external awards.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Approvers for external awards in UAccess Student are based on account information in UAccess Financials.  
      | The approvers include the: |
|      | • Fiscal Officer |
|      | • Account Supervisor |
|      | • Account Manager |
|      | • Specific Delegates |
| 2.   | The information from UAccess Financials is migrated into UAccess Student during a nightly process that updates all the account approver information. This is a one-way transfer of information and no notifications regarding award approval are made in UAccess Financials. |
| 3.   | Begin by accessing UAccess Financials. The link is found on the landing page at uaccess.arizona.edu (http://uaccess.arizona.edu/).  
      | Make sure you are on the Main Menu tab and then scroll down to see the appropriate section.  
      | Click the scrollbar. |
Step | Action
--- | ---
4. | The **Account Delegate** link is in the far right column, under the **Workflow** section.

Click the **Account Delegate** link.

**Account Delegate**
5. Enter the number for the account you are looking up.

Enter "5643800" in the **Account Number** field.

6. Click the **search** button.
### Step 7
**Note:** If there are no results, the account has no delegates set up. This means the only authorized approvers are the Fiscal Officer, Account Supervisor, and Account Manager.

In order to view those authorized on an account with no delegates, from the Main Menu tab and the Lookup and Maintenance column, go to Chart of Accounts/Accounting Line > Account.

### Step 8
Some of the information you may need is on this page and the rest is on the Account Inquiry screen.

Click the 5643800 link.

### Step 9
Click the scrollbar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 10.  | Here you see the Fiscal Officer, Account Supervisor, and Account Manager.  

**Note:** This is the same screen you see when navigating directly to Account from the Lookup and Maintenance column. |
| 11.  | To identify the delegates you need to return to the Account Delegate Lookup.  

Click the Close button.  

[x]
Step | Action
--- | ---
12. | This is the list of delegates. You must be sure the following columns have the listed designations:
   - Document Type Name: KFS, KFST, or FAEX
   - Account Delegate Active = Yes

If a user is listed but with any other values, they will not be pulled into UAccess Student as an approver for that account.

13. | You’ve now identified who has the ability to see and approve a Financial Aid award in UAccess Student, based on the account number.

   **Note:** If the designated approver for your department is not listed they must be set up in UAccess Financials as a delegate for the FAEX document type. If you do not have access to do this in UAccess Financials, please see your business manager.

14. | Any of the people identified can approve the external awards on that account, but only if they’ve obtained the necessary security in UAccess Student to access the Financial Aid External Awards components.

15. | Please review *The Basic Workflow > Entering Awards > Notifying Approvers* tutorial for an explanation of how transactions are sent to approvers and to see how to send a system generated email to inform an approver of pending awards.

**End of Procedure.**
## Setting a User Default & Understanding Aid Years

### Procedure

While there are many user defaults, this tutorial shows you how to set one that may be beneficial when entering External Awards.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | This tutorial begins after navigating to **Main Menu > Set Up SACR > User Defaults.**  
      | **Note:** You are **not required to set this default.** If you choose to use it, make sure you change it in subsequent Aid Years. |
| 2.   | Click the **User Defaults 2** tab. |

![User Defaults 2 Tab](image-url)

---

**User Defaults 2 Tab:**
- User ID: 10001000
- Name: Jane Smith
- School: University of Arizona
- Aid Year: 2023/2024
- Business Unit: UA-ZH
- Application Center: UA-ZH
- Recruiting Center: UA-ZH
- Advisor's Office: UA-ZH
- Department: UA-ZH
- Admit Type: New
- Campus: Main Campus
- Institution Set: Main Set
Step | Action
---|---
3. | The one setting specific to External Awards is the Aid Year.
   
   If you know the Aid Year, you may enter it directly into the field. Otherwise, use the magnifying glass.
   
   Click the **Aid Year** magnifying glass.

4. | The Aid Year correlates to the Academic Year, which includes the fall of one year through the winter, spring, and summer of the next.

   **Note:** *The four-digit code is always the second half of the Aid Year.*

5. | Click on any blue underlined link in the appropriate row to select the Aid Year.
   
   Click the **2013** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 6.   | **Note:** For an explanation of Aid Years, please refer to the Introduction > Setting a User Default & Understanding Aid Years tutorial.  
Click the **2013** link. |
| 7.   | The final step is to save your changes.  
Click the **Save** button. |
| 8.   | That's all it takes to set a user default.  
**Note:** You may also want to check a setting on the **User Defaults 4** tab. This one is not specific to Financial Aid, but it is recommended that you check the Carry ID box. This function often stores a student's ID so that as you navigate between components you don't have to re-enter the ID each time. |

*End of Procedure.*
The Basic Workflow

Entering Awards

Basic Award Entry & New Awards

Procedure

Use the Enter External Awards component to enter departmental awards for students (such as department grants, scholarships, and stipends).

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This tutorial begins after navigating to Main Menu &gt; Financial Aid &gt; UA External Awards &gt; 2013 &gt; Enter External Awards.</td>
</tr>
</tbody>
</table>
| 2.   | If the Aid Year is not set in the User Defaults you may enter it here, use the magnifying glass to search, or simply click Search to see a list of available Aid Years.  
   
   **Note:** To review how to set the Aid Year in the User Defaults, refer to the Introduction > Setting a User Default & Understanding Aid Years tutorial.  
   
   Click the Search button. |
| 3.   | The Account is the UAccess Financials account number. This field is optional but may be the most efficient way to identify the appropriate award.  
   
   **Note:** If you don't know the account number you may click the magnifying glass to search, but be aware that this will bring up a comprehensive list of all accounts associated with external awards.  
   
   Enter "2283700" in the Account field. |
### Step 4

Press [Tab] or [Enter] to populate the **Item Type**.

**Note:** If you know the 12-digit Item Type, you may skip the Account and enter the **Item Type** directly in the appropriate field.

Press [Tab].

### Step 5

If the Item Type does not populate, this means there is more than one Item Type associated with the account entered.

Click the **Item Type** magnifying glass.
6. When the account has separate Item Types, they often distinguish between non-refundable and refundable awards. Look at the Description to determine the correct Item Type.

7. A stipend with the word Reg at the end of the description indicates a non-refundable award. These awards only pay tuition (resident or non-resident) and mandatory fees, as listed on the Bursar’s website (http://www.bursar.arizona.edu/students/fees/index.asp).

8. A stipend (without Reg) is for cash awards, which means the student will receive any extra money after tuition and fees are paid.

   Note: A scholarship with Tuition in the description indicates a non-refundable award, while Scholarship (without Tuition) is for cash awards.

9. To request a new Item Type for an account not available in UAccess, refer to the instructions in the Frequently Asked Questions section on the OSFA Departmental Help for Scholarships and Stipends (http://financialaid.arizona.edu/departments/stipends) page.

10. In this example you are awarding a cash stipend.

    Click the Physics Stip 000004 link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>Enter the <strong>Student ID</strong> for the student you are awarding. Enter &quot;<strong>01020304</strong>&quot; in the <strong>Student ID</strong> field.</td>
</tr>
<tr>
<td>12.</td>
<td>Press [Tab] or [Enter] to populate the student's name, as well as other information. Press [Tab].</td>
</tr>
<tr>
<td>13.</td>
<td>If the Student ID you enter is not valid, you see an error message. This message displays not only when the ID number is incorrect but also if the student is not currently an active student. <strong>Note:</strong> An active student does not have to be enrolled in classes, only admitted to or enrolled in a program. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
14. Enter a valid Student ID.

**Note:** The magnifying glass allows you to search for a student and only returns results for active students.

Enter "19181716" in the Student ID field.

15. In order to populate the remaining fields you must press [Tab] or [Enter].

Once you enter a valid Student ID, notice the student's name displays.

Press [Tab].

16. If the Career does not automatically populate, you must select the appropriate one.

**Note:** Only Careers defined for the student display when you click the magnifying glass.
### Step 17

The system does an initial check to see if an award has been processed for the same Aid Year, Item Type, and student combination. Click the **Entry Type** drop-down list.

### Step 18

Since this is the first time this student has been awarded from this Item Type for the Aid Year, **New** is the only Entry Type available.

**Note:** If **New** does not display, this is not a new award and you must determine the appropriate Entry Type. Please refer to the tutorials in the Modifying Awards section for more information on the other Entry Types.

Click the **New** drop-down list.

### Step 19

Enter the appropriate amount in the **Award Total** field.

Enter "2000" in the **Award Total** field.

### Step 20

Press **[Tab]**.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>21.</td>
<td>If necessary, scroll to the right to see the remainder of the fields on the grid.  Click the scrollbar.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 22.  | The Award Total automatically splits evenly between the fall and spring semesters. These are free-text fields and may be adjusted as appropriate.  
**Note:** The decimal point (for whole dollar amounts) and the comma are not required. |
| 23.  | Sum 1 is for any award you want to disburse that semester.  Sum 2 holds the award until summer session 2. This means that awards entered for that semester do not post until the new fiscal year, which starts July 1.  
**Note:** You cannot generally award summer until late April or early May. When summer awarding opens, OSFA sends an email to all UAccess Student Financial Aid users. |
<p>| 24.  | Click the Comments link. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 25.  | The Comments box is a place for requestors and approvers to communicate. Any comments entered are visible during the approval process, as well as in the various Manage Awards components.  

**Note:** The Office of Student Financial Aid does not monitor these comments. Please contact OSFA directly if you need to convey information or request unit exceptions.  

Enter "**Comments for approver**" in the **Comment** field.  

<table>
<thead>
<tr>
<th>26.</th>
<th>Click the <strong>OK</strong> button.</th>
</tr>
</thead>
<tbody>
<tr>
<td>27.</td>
<td>If there are more students to award, click the <strong>Add (+)</strong> button to add another row and then complete as appropriate.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>28.</td>
<td>Additional steps and processes are important to understand. Please refer to the relevant sections and/or tutorials for information on:</td>
</tr>
</tbody>
</table>
|      | • Notifying Approvers  
|      | • Checking Errors and Submitting  
|      | • Using the File Upload Link  
|      | • Approving Awards  
|      | • Modifying Awards  
|      | • Managing awards  

*End of Procedure.*
Notifying Approvers

Procedure

When a transaction is submitted, it automatically routes to the appropriate approvers. Approvers only receive notification of pending awards if the requestor indicates in the transaction that an email should be sent.

*Note:* For more information on determining who the approvers are on an account, refer to the Introduction > Identifying Approvers tutorial.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | To send a system generated email to an approver, the **Email Notification** section must be completed. The email sent is a generic message informing the person there are awards awaiting approval and contains a link to the Approver External Awards component.  
This is an optional field. Enter the NetID of the approver you want to receive the email. If no NetID is entered, the approver does not receive an email regarding awards. |
| 2.   | Enter the approver's NetID. If you don't know the NetID, click the magnifying glass to search.  
*Note:* When the magnifying glass lookup is used you are searching all approvers, not just those for the accounts in the transaction.  
Enter "jaxson50" in the **Approver Oprid** field. |
| 3.   | Press [Tab] or [Enter] to populate the remaining fields.  
Press [Tab]. |
Step | Action
--- | ---
4. | Enter as many approvers as necessary or appropriate.
   
Since this transaction contains more than one account, and each of those accounts has different approvers you want to notify, enter the additional NetID.

Click the Add button.

5. | Enter "jaxson100" in the Approver Oprid field.

6. | Press [Tab].

7. | Keep in mind that this section does not affect or control who the award is assigned to for approval. The only function here is to designate a notification email be sent to the approver(s) entered.

8. | Also, it is important to understand that you cannot both submit and approve the same transaction.

If you are one of the approvers on a transaction you submit, the Approve External Awards component will not display the transaction you submitted.
### Step 9

Additional steps and processes are important to understand. Please refer to the relevant sections and/or tutorials for information on:

- Basic Award Entry & New Awards
- Checking Errors and Submitting
- Using the File Upload Link
- Approving Awards
- Modifying Awards
- Managing awards

**End of Procedure.**
# Checking Errors & Submitting Procedure

This tutorial explains the error check and submitting process for External Awards.

![Image of UAccess Student interface](image)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The <strong>Submit</strong> button is grayed out until an error check is completed and all errors are resolved. Whether you enter the information directly into the fields or use the File Upload, you must check errors before you can submit.</td>
</tr>
</tbody>
</table>
| 2.   | This check identifies common errors in awarding only, not disbursement, that prevent the award from loading.  

**Note:** See Appendix A for a summarized list of errors.  

Click the **Check Errors** button. |
### Training Guide

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#### Step 3

When there are no errors you don't see a message, the Submit button is no longer grayed out, and the next step is simply to click Submit.

In this example you do have errors, so you see a message letting you know you must correct the errors before you can submit.

Click the **OK** button.

---

#### Step 4

Click the scrollbar.
Step | Action
--- | ---
5. | The Error link only displays on rows where there is an identified error.

You may also see a Messages link. Messages do not keep an award from being submitted and are only information you should know about the award.

Click the Error link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 6.   | Any errors associated with that line display in the Details box.  
This error specifies that a canceled award cannot have any award amounts.  
Click the OK button. |
<p>| 7.   | You must either make the indicated corrections or delete the row in order to clear the error. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>In this example the fields have now been adjusted to remove any amounts in the semester fields.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>Error</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 10.  | This award has two errors. The first indicates the semester amounts do not equal the total award. The second explains that students with a MEDS career cannot have summer awards.  
Click the **OK** button. |
| 11.  | In order to submit the other two awards without correcting this one, delete the row.  
Click the **Delete** button. |
| 12.  | Click the **OK** button. |
| 13.  | Click the **OK** button. |
14. Click the scrollbar.

15. With the errors corrected or the relevant rows deleted you need to check for errors again.

Click the Check Errors button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.</td>
<td>Now that you have no errors, the <strong>Submit</strong> button is no longer grayed out.</td>
</tr>
<tr>
<td></td>
<td><strong>Click the Submit button.</strong></td>
</tr>
</tbody>
</table>
17. Your award was successfully submitted.

Click the OK button.
18. Notice you now have a Transaction Number, which identifies this set of awards.

Once the transaction is submitted you should not add any additional rows, make any changes, or attempt to re-submit. Doing so will result in errors due to duplication.

To enter more awards, click the Return to Search button at the bottom of the page or the Enter External Awards link in the menu bar and begin a new transaction.

19. Additional steps and processes are important to understand. Please refer to the relevant sections and/or tutorials for information on:

- Basic Award Entry & New Awards
- Notifying Approvers
- Using the File Upload Link
- Approving Awards
- Modifying Awards
- Managing Awards

End of Procedure.
Using the File Upload Link

Procedure

File Upload is a way to import your award information from a spreadsheet into the fields in the External Awards component.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This tutorial begins after navigating to Main Menu &gt; Financial Aid &gt; UA External Awards &gt; 2013 &gt; Enter External Awards.</td>
</tr>
<tr>
<td>2.</td>
<td>You are not required to use the File Upload capability. If you prefer, it is completely acceptable to input all your award information directly into the Enter Awards fields.</td>
</tr>
</tbody>
</table>

### File Upload Link

The first step in using the File Upload is to properly configure the file you plan to upload, as it must be in a very specific format.

**Note:** See Appendix B for a printed version of the File Layout Guide.

Click the **File Layout Guide** link.
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Financial Aid: External Awards

Step | Action
--- | ---
4. | The File Layout Guide provides all the information you need to set up your document as well as a list of the most likely reasons a file would fail to load.
   
   Click the scrollbar.

5. | Click the **Return** button.
   
   ![Return Button]

6. | Once your document is prepared and formatted appropriately, you can upload.
   
   Click the **File Upload** link.
   
   ![File Upload Button]
Step | Action
--- | ---
7. | The next step is to locate and upload the .csv file.

Click the **Add Attachment** button.

**Add Attachment**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>As long as it is in the correct format, you can upload the file from any location. Click the <strong>Browse</strong> button.</td>
</tr>
</tbody>
</table>

**Browse...**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 9.   | Select the appropriate file.  

**Note:** Make sure the file you choose is not an excel file, but the comma separated value (.csv) one. This difference can be seen by either looking at the icon or the Type.

Click the **Awards for Upload** list item. |
| 10.  | Click the **Open** button. |
### Step 11

**Action**: Click the **Upload** button.

[Upload]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>The message box indicates whether or not the file uploaded. Click the OK button.</td>
</tr>
</tbody>
</table>
13. **Note:** When the File Upload is utilized, the Account is not entered but will populate once you check for errors.

14. You can use the File Upload link and also add additional students/awards to the same transaction. If you do this, it is important you do the File Upload first and then the manual entry awards. If you do not follow this order all awards may not populate as expected.

15. Additional steps and processes are important to understand. Please refer to the relevant sections and/or tutorials for information on:
   - Basic Award Entry & New Awards
   - Notifying Approvers
   - Checking Errors and Submitting
   - Approving Awards
   - Modifying Awards
   - Managing awards

**End of Procedure.**
Approving Awards

Approving Awards

Procedure

Use the Approve External Awards component to approve or deny departmental awards for which you are one of the authorized approvers.

*Note:* For information on identifying the approvers for an account, please refer to the Introduction > Identifying Approvers tutorial.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Approvers may receive an email stating there are awards to approve. That email contains a link that directs you to this component. This is not an automatic email but must be specified by the person entering the award.  

*Note: This component can also be accessed by navigating to Main Menu > Financial Aid > UA External Awards > 2013 Approve External Awards.* |
| 2.   | You can enter the Aid Year directly in the field, use the magnifying glass to search, or leave it blank.  

*Note: For an explanation of Aid Year, please refer to the Introduction > Setting a User Default & Understanding Aid Years tutorial.*  
Click the Search button. |
### Step 3
This page defaults to show only Unapproved awards.

If awards were already approved or denied by another one of the authorized approvers, they will no longer display for you.

### Step 4
No information is editable, other than Comments. If changes need made to any field, the award should be denied.

### Step 5
To see the rest of the columns, scroll to the right. For an explanation of the different fields, refer to *The Basic Workflow > Entering Awards > Basic Award Entry and New Awards*.

### Step 6
If you determine the awards listed are accurate, you can change the Processing Status of all to Approved with a single click.

### Step 7
Be aware that if you have more rows than are visible on a single page (for example: 1-50 of 100), using the **Approve All** button changes the status of all rows, not just those visible on this page.

Click the **Approve All** button.
Step | Action
--- | ---
8. | Notice the Processing Status for both students is now **Approved**.

Approvers can also take action on individual awards by clicking on the Processing Status for a specific student.

Click the **Processing Status** drop-down list.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 9.   | From the drop-down list, select the appropriate Status. **Note:** *Don't Load is used to cancel an Unapproved award.*  
Click the **Unapproved** list item. |
| 10.  | To change the status of another award, simply click the drop-down.  
Click the **Processing Status** drop-down list. |
| 11.  | Click the **Denied** list item. |
| 12.  | Scroll to the right to see the additional information on the page.  
Click the scrollbar. |
| 13.  | Denials must be documented by clicking the **Comments** link and entering notes for the requestor.  
Click the **Comments** link. |
### Step | Action
--- | ---
14. | Comments must indicate the exact reason for the denial and, if possible, what action the requestor must take to correct it.
   
   If you don’t put a denial reason then the requestor won’t know what needs done to correct the award.
   
   Enter "Please wait to award summer." in the Comment field.

15. | Click the **OK** button.

16. | Click the scrollbar.
Step | Action
--- | ---
17. | Click the **Submit** button.
18. | Your awards are now submitted.

**End of Procedure.**
Modifying Awards

Adding to an Award

Procedure

When the Aid Year, student, and Item Type for an award are identical to an award already processed, you must choose the appropriate Entry Type.

This tutorial walks you through using the Add option.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | For the purposes of this tutorial much of the information in the Enter Awards section has been filled out for you.  
Note: To review how to complete the already entered fields, please refer to The Basic Workflow > Entering Awards > Basic Award Entry & New Awards. |
| 2.   | In this example, Edwin Quiglee needs to have his award increased by $500 for the fall.  
Click the Entry Type drop-down list. |
Training Guide
Financial Aid: External Awards

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 3.   | Since you are simply adding to his current award, select the Add option.  

*Note: Select this option when you are increasing an award, regardless of the semester or whether or not disbursement has occurred.*  
Click the **Add** list item. |
| 4.   | The **Award Total** is the amount being added to the previous award.  
Remember, in this example Edwin is receiving an additional $500 for the fall.  
Enter "500" in the **Award Total** field. |
| 5.   | Press [Tab]. |
| 6.   | Click the scrollbar. |

7.   | By default the award automatically splits between fall and spring, but in this case the addition only applies to fall, so semester amounts need adjusted. |
<p>| 8.   | Enter &quot;500&quot; in the <strong>Fall 2012</strong> field. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>You can either delete the spring amount or enter zero. Enter &quot;0&quot; in the <strong>Spring 2013</strong> field.</td>
</tr>
</tbody>
</table>
| 10.  | Click Comments to enter any relevant or important information regarding the award.  

**Note:** Remember, the Comments box is a place for requestors and approvers to communicate. The Office of Student Financial Aid does not monitor these comments. Please contact OSFA directly if you need to convey information or request unit exceptions. |
| 11.  | Additional steps and processes are important to understand. Please refer to the relevant sections and/or tutorials for information on:  

- Basic Award Entry & New Awards  
- Notifying Approvers  
- Checking Errors and Submitting  
- Using the File Upload Link  
- Approving Awards  
- Managing Awards  

**End of Procedure.**
Canceling an Award

Procedure

When the Aid Year, student, and Item Type for an award are identical to an award already processed, you must choose the appropriate Entry Type.

This tutorial walks you through using the Cancel option. Use this option when a student should no longer be awarded any money from a previously awarded Item Type and Aid Year combination.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | For the purposes of this tutorial much of the information in the Enter Awards section has been filled out for you.  

*Note: To review how to complete the already entered fields, please refer to The Basic Workflow > Entering Awards > Basic Award Entry & New Awards.*  

| 2.   | In this example you are canceling Evangeline's current award.  

Click the Entry Type drop-down list. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the <strong>Cancel</strong> list item.</td>
</tr>
</tbody>
</table>
| 4.   | Since you are canceling the award there are no amounts to enter in any of the fields.  
**Note:** Be sure to include any relevant or important information in the Comments. Remember, the Comments box is a place for requestors and approvers to communicate. The Office of Student Financial Aid does not monitor these comments. Please contact OSFA directly if you need to convey information or request unit exceptions. |
| 5.   | Additional steps and processes are important to understand. Please refer to the relevant sections and/or tutorials for information on:  
- Basic Award Entry & New Awards  
- Notifying Approvers  
- Checking Errors and Submitting  
- Using the File Upload Link  
- Approving Awards  
- Managing Awards |

**End of Procedure.**
Replacing an Award

Procedure

When the Aid Year, student, and Item Type for an award are identical to an award already processed, you must choose the appropriate Entry Type.

This tutorial walks you through using the Replace option.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>For the purposes of this tutorial much of the information in the Enter Awards section has been filled out for you. <strong>Note:</strong> To review how to complete the already entered fields, please refer to The Basic Workflow &gt; Entering Awards &gt; Basic Award Entry &amp; New Awards.</td>
</tr>
<tr>
<td>2.</td>
<td>Replace applies to several scenarios but is most often used when you need to decrease an award for a semester that has not disbursed. In this example, it is prior to Fall disbursement and you need to reduce the award for Ross by $500 for each semester. Click the Entry Type drop-down list.</td>
</tr>
</tbody>
</table>

![Image of UAccess Student interface showing External Awards page]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 3.   | There is no Reduce option, and since you are not adding or canceling, you must choose Replace. Click the **Replace** list item.  
*Replace* |
| 4.   | When Replace is used, the award you are entering replaces, or overwrites, the previous award.  
This means that the amounts entered in the Award Total and semester fields become the new award for the student from that Item Type. |
| 5.   | Because of this replacement, it is often helpful to know the previous amounts (or that student and Item Type).  
To see this information, hover over or click the **Current** link.  
Click the **Current** link.  
*Current* |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>The Student Award Information, including what has been offered and/or disbursed, displays. For Ross, his original award was for $5000, split as shown.</td>
</tr>
<tr>
<td>7.</td>
<td>Since the award needs to be reduced by $500 each semester, you can use the information here to determine the appropriate amounts. This means Fall and Spring should both be $1500 and Sum 1 should be $500, for a total award of $3500.</td>
</tr>
<tr>
<td>8.</td>
<td>Enter &quot;3500&quot; in the <strong>Award Total</strong> field.</td>
</tr>
<tr>
<td>9.</td>
<td>Press [Tab].</td>
</tr>
<tr>
<td>10.</td>
<td>Click the scrollbar.</td>
</tr>
<tr>
<td>11.</td>
<td>Remember, the Award Total automatically splits between fall and spring, but in this example the award is being reduced by $500 each semester. This means Fall and Spring should be $1500 and Sum 1 should be $500. Enter &quot;1500&quot; in the <strong>Fall 2012</strong> field.</td>
</tr>
<tr>
<td>12.</td>
<td>Enter &quot;1500&quot; in the <strong>Spring 2013</strong> field.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>13.</td>
<td>Enter &quot;500&quot; in the <strong>Sum 1 2013</strong> field.</td>
</tr>
<tr>
<td>14.</td>
<td>The adjusted amounts have now been entered and, when processed, will replace the previous award for this student and Item Type.</td>
</tr>
<tr>
<td>15.</td>
<td>Additional steps and processes are important to understand. Please refer to the relevant sections and/or tutorials for information on:</td>
</tr>
<tr>
<td></td>
<td>• Basic Award Entry &amp; New Awards</td>
</tr>
<tr>
<td></td>
<td>• Notifying Approvers</td>
</tr>
<tr>
<td></td>
<td>• Checking Errors and Submitting</td>
</tr>
<tr>
<td></td>
<td>• Using the File Upload Link</td>
</tr>
<tr>
<td></td>
<td>• Approving Awards</td>
</tr>
<tr>
<td></td>
<td>• Managing Awards</td>
</tr>
</tbody>
</table>

**End of Procedure.**
Managing Awards

View External Awards by Student

Procedure

Requestors and approvers can use the view pages to review and monitor External Awards, as well as see a comprehensive view of all processed financial aid for a student.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | To begin, navigate to Main Menu > Financial Aid > UA External Awards > 2013 > View Ext Awards by Student.  

*Note: In this tutorial, the navigation has been completed for you.* |
| 2.   | It is important to narrow down your search results. Clicking Search without entering additional search criteria will run a search for all students receiving awards for any Aid Year. |
| 3.   | It can be helpful to start by entering the Aid Year.  

Enter "2013" in the Aid Year field. |
### Step 4
Enter the Student ID (Empl ID) or use the First/Last Name fields to search.

Enter "02200440" in the Empl ID field.

### Step 5
Click the Search button.

### Step 6
This page shows an **Award Summary** (all processed financial aid) and any **Pending External Awards**.

In addition, the **External Awards Transaction History** shows any action on all external awards. For example, if an award was entered and then more money was awarded for the same Item Type, both transactions show.

**Note:** To export the table to excel, click the **Download icon**.

### Step 7
To look up another student, go back to the search screen.

Click the **Return to Search** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>For more specific information on the information in the External Awards grids, please view <em>The Basic Workflow &gt; Entering Awards &gt; Basic Award Entry &amp; New Awards</em>.</td>
</tr>
<tr>
<td></td>
<td><strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
View External Awards by Item Type

Procedure

Requestors and approvers can use the view pages to review and monitor External Awards, as well as see a comprehensive view of all processed financial aid for an Item Type.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | To begin, navigate to **Main Menu > Financial Aid > UA External Awards > 2013 > View Ext Awards by Item Type**.  
      | *Note:* In this tutorial, the navigation has been completed for you. |
| 2.   | The Aid Year will automatically populate if it has been set in the User Defaults. |
| 3.   | Enter the 12-digit Item Type.  
<pre><code>  | Enter &quot;082086000004&quot; in the Item Type field. |
</code></pre>
<p>| 4.   | Click the <strong>Search</strong> button. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 5.   | The page shows a comprehensive list of any pending or processed external awards for the Item Type specified.  

*Note: To export the table to excel, click the Download icon.* |
| 6.   | To look up another Item Type click the **Return to Search** button to go back to the search screen. |
| 7.   | For more specific information on the information in the External Awards grids, please view *The Basic Workflow > Entering Awards > Basic Award Entry & New Awards.*  

**End of Procedure.**
Managing Your Awards/Setting to Don't Load

Procedure

**Manage External Awards** allows you see the current status of any of your awards and also gives you the opportunity to set awards to Don't Load.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | To begin, navigate to Main Menu > Financial Aid > Awards > UA External Awards > 2013 > Manage Student External Awards.  
*Note: In this tutorial, the navigation has been completed for you.* |
| 2.   | With this component you can only access students and transactions where you submitted, approved, or denied the award.  
*Note: The Aid Year automatically populates if it is set in your User Defaults. To review how to do this, refer to the Introduction > Setting a User Default & Understanding Aid Years tutorial.* |
| 3.   | You do not enter any other search fields on this screen. Since this component is limited to those awards you are part of, clicking search finds only those awards.  
Click the **Search** button. |
### Step 4
In the **Filter By** section there are multiple ways to narrow down the list of results.

In this example you only have one award that you've submitted so there is no need to filter. With a more extensive list you may want to use one of the filters to narrow down the list of results.

### Step 5
Using the Processing Status allows you to limit your list just those awards of a particular status, such as denied or still unapproved.

Click the **Processing Status** drop-down list.

### Step 6
If you are a requester, you should build into your work process periodically checking for any denied awards. You do not receive any notification when an award is denied so this component is a great place to identify any denials.

There are also several other ways to narrow your search in order to identify awards at particular points in the process.

Click the **Processing Status** drop-down list.

### Step 7
The other function of this component is the use of the Status drop-down. Any awards that have not been approved can essentially be canceled by changing the Status.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Click the <strong>Status</strong> drop-down list.</td>
</tr>
<tr>
<td></td>
<td><img src="image.png" alt="UAccess Student Screen Shot" /></td>
</tr>
</tbody>
</table>
| 9.   | **Don't Load** stops the award from progressing and it will no longer show in the approver's list of awards to approve.  
Wait one day, until the nightly batch process runs, before re-entering the award.  
Click the **Don't Load** list item.  
**Don't Load** |
| 10.  | If necessary, scroll to the right in order to enter a comment.  
Click the scrollbar.  
**Comment** |
| 11.  | Click the **Comment** link.  
**Comment** |
| 12.  | Enter your comments in the free-text field.  
Click the **OK** button.  
**OK** |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>Click the scrollbar.</td>
</tr>
<tr>
<td>14.</td>
<td>If any change is made to the Status, you must submit the transaction. Click the <strong>Submit</strong> button.</td>
</tr>
<tr>
<td>15.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>16.</td>
<td>Once you submit the change to Don't Load, you cannot undo the change and the award will need re-entered. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
Running a Query

Procedure

Queries are pre-built reports that can be run to view various pieces of specific information.

At present, the queries in UAccess Student are generally the resource to use when looking for most Financial Aid related information, such as a list of all Item Types or Item Types for your department and reports by Student ID, Item Type, or Financials account number.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>To begin, navigate to <strong>Main Menu &gt; Reporting Tools &gt; Query &gt; Query Viewer</strong>.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> In this tutorial, the navigation has been completed for you.</td>
</tr>
<tr>
<td>2.</td>
<td>Leave the <strong>Search By</strong> field blank to see a list of all queries you have access to.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Many users will only have access to the financial aid queries, so it is not necessary to filter your search.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>3.</td>
<td>The list automatically sorts by Query Name but you can sort by clicking on any column heading.</td>
</tr>
<tr>
<td></td>
<td>For the purposes of this tutorial, and in order to identify a particular query, it is easiest to sort on the Description column.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Description</strong> link.</td>
</tr>
</tbody>
</table>
Step | Action
---|---
4. | Choose the format you would like the query to display in. **HTML** opens in a new browser window, while **Excel** displays in an Excel spreadsheet.

*Note: If you are unsure what information the query provides, simply click on **HTML** or **Excel**. This shows you the values you have to enter and what information is returned, often without running the report.*

Click the **HTML** link.

5. | Queries display in a separate window or tab, as a pop-up. The pop-up alert may appear if you have not already allowed pop-ups for this site.

Click the **Pop-up** alert.

6. | In order to view queries you have to allow pop-ups for this site. To avoid seeing this pop-up in the future you should select the **Always Allow** option.

Click the **Always Allow Pop-ups from This Site** list item.

7. | Click the **Yes** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>After allowing the pop-up you need to search the queries again. Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>9.</td>
<td>Sorting is not required but for this example you are sorting by Description. Click the <strong>Description</strong> column header.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>HTML</strong> link.</td>
</tr>
<tr>
<td>11.</td>
<td>This query opens in a separate browser tab or window. Click the <strong>Maximize</strong> button.</td>
</tr>
<tr>
<td>12.</td>
<td>Notice that even without running the query you can already see what information this report contains, based on the column headers. If this report does not contain the information you are looking for, close the browser window and select another query.</td>
</tr>
</tbody>
</table>
### Training Guide
### Financial Aid: External Awards

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>Any values required to run the query are specified in the area above the <strong>View Results</strong> button.</td>
</tr>
<tr>
<td>14.</td>
<td>Once search values are entered, click <strong>View Results</strong> to see matches.</td>
</tr>
<tr>
<td>15.</td>
<td>When the query is run as HTML, if there are results you will see options to download to Excel or a CSV file.</td>
</tr>
<tr>
<td>16.</td>
<td>Once you are done viewing or downloading, simply close the browser window. Click the <strong>Minimize</strong> link.</td>
</tr>
<tr>
<td>17.</td>
<td>You can view any query by repeating the steps shown in this tutorial.</td>
</tr>
</tbody>
</table>

*End of Procedure.*
Appendix A: Error Check Summary

Below is a summarized list of some of the errors the system may return when the Check Error is performed. This is not meant to be a comprehensive list of all errors.

- The Item Type does not exist for the Aid Year.*
- The sum of all disbursements does not equal the Award Amount.
- A pending award already exists for this Student and Item Type.
- The Entry Type is not consistent with the Award Amount.
- The transaction will create a charge on the student’s account.
- There is not a Account associated with this Item Type.*
- You must specify an Item type for this award. *
- You must specify an Entry Type.
- The award cannot be processed because there are disbursements in a term following the graduation term for the Career.
- There are duplicate entries for the Student and Item Type.
- The award cannot be processed for the selected aid year.
- The award cannot be processed for the selected term.
- The Entry Type is invalid. *
- The student cannot be awarded for this Career. *
- The Student ID does not exist. *
- You must specify a Career for this transaction *

* More common with File Loads
Appendix B: File Load Reference Sheet

Requires the spreadsheet being loaded to be exactly in the format and order below, with no header row. The header row is shown here for reference purposes only!

- The file type to select when saving is CSV (Comma delimited) or Comma Separated Values and the file name should be no more than 60 characters.

```
<table>
<thead>
<tr>
<th>Item Type</th>
<th>Student ID</th>
<th>Career</th>
<th>Entry Type</th>
<th>Award Total</th>
<th>Fall</th>
<th>Spring</th>
<th>Sum 1</th>
<th>Sum 2</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>089006000001</td>
<td>00112233</td>
<td>UGRD</td>
<td>New</td>
<td>2500.00</td>
<td>1250.00</td>
<td>1250.00</td>
<td>0.00</td>
<td>0.00</td>
<td>Free text field</td>
</tr>
<tr>
<td>089006000001</td>
<td>00223344</td>
<td>GRAD</td>
<td>Cancel</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>Free text field</td>
</tr>
<tr>
<td>089006000001</td>
<td>00334455</td>
<td>UGRD</td>
<td>Replace</td>
<td>1500.00</td>
<td>650.00</td>
<td>750.00</td>
<td>0.00</td>
<td>0.00</td>
<td>Free text field</td>
</tr>
<tr>
<td>089006000001</td>
<td>00445566</td>
<td>UGRD</td>
<td>Add</td>
<td>500.00</td>
<td>0.00</td>
<td>0.00</td>
<td>500.00</td>
<td>0.00</td>
<td>Free text field</td>
</tr>
<tr>
<td>089006000001</td>
<td>00556677</td>
<td>PHRM</td>
<td>Replace</td>
<td>5000.00</td>
<td>2500.00</td>
<td>2500.00</td>
<td>0.00</td>
<td>0.00</td>
<td>Free text field</td>
</tr>
</tbody>
</table>
```

- **Item Type:** 12 digit number identifying award. Do not drop leading zeros
- **Student ID:** 8 digit number. Do not drop leading zeros
- **Career:** UGRD, GRAD, MEDS, LAW, PHRM*. Must be all caps
- **Entry Type:** New, Add, Cancel, Replace or N, A, C, R. Must be initial or all caps, or capital
- **Award Total:** Total amount for all terms. Include 2 decimals (opt)*
- **Fall:** Total award for Fall term
- **Spring:** Total award for Spring term
- **Sum 1:** Total award for Summer 1 term
- **Sum 2:** Total award for Summer 2 term
- **Comments:** This field is optional and will load in the Comments field on the Enter Awards grid.

*The formatting should follow the guidelines above, although when saved as a .csv the leading zeros will seem to disappear.*

*OSFA does not process any awards for CORR so please do not select or enter this career in the field.*

*The system will assume a whole dollar amount and add .00 if the decimals are not included.*

If your file does not load the most likely reasons are:

- The file is not in the .csv format
- You have more than 100 transactions (rows) in your file. To load more than 100, use multiple transactions.
- Your file name is more than 60 characters.