KENT STATE
UNIVERSITY
INFORMATION SERVICES

Student Financial Aid Office

Originate or Approve a Scholarship Payment Authorization Form

Job Aid

April 2011

Title	**Originate or Approve a Scholarship Payment Application Form**
Date	4/24/2008, updated 4/21/2011
Created by	Sheila Wilson and Sylvia Bustard, Student Financial Aid Office Lindy Lewis and Julie Kennedy, IS Application Support
Created for	Student Financial Aid Office Information Services Application Support
Copyright	Kent State University, Sungard HE, Experian 2011
Get help with this process	Sheila Wilson, Office of Student Financial Aid swilso59@kent.edu (330) 672-0528
Technical support	Help Desk: support@kent.edu or http://support.kent.edu

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About the Scholarship Payment Application Work Flow

Each academic department has a designated scholarship administrator, who uses this work flow to **request that a scholarship payment be made to a student account**; in the current, or in a future term. The request form passes to the person who is responsible for authorizing payments from the scholarship account. Upon approval, the Office of Student Financial Aid processes the transfer of funds.

Administrators may also use this form to **revise** or **delete** a payment. They may look up a past request by querying the list of Historical Scholarship Payment Authorizations.

Workflow General Reference is recommended reading to accompany this document, see http://www.kent.edu/is/training/documentation.cfm to download.

Get Help With This Process

To obtain access to participate in this work flow, contact your departmental security administrator, or Sheila Wilson at (330) 672-0528, swilso59@kent.edu for assistance. If errors are discovered which require immediate action after a form has been submitted, contact Sheila.

Note your authorizers here in case you need to request the return of a form:

1	Orignator	scholarship administrator
2	Dean-Level Authorizer	
3	Financial Aid Authorizer	

Contact the Help Desk at 330-672-4357 for technical support *(e.g. can't see Worklist, can't log in, browser problems with the work flow.)*

Contact any of the Office of Student Financial Aid Scholarship Coordination Services staff below if you have questions about the this process or scholarships listed on the form:

Assistant Director
Sandra Montgomery (330) 672-0501
smontg1@kent.edu

Joyce Moore, Scholarship Coordination
Services Secretary
jmoore@kent.edu

 Financial Aid Counselor, Scholarships
Sheila Wilson (330) 672-0528
swilso59@kent.edu

Part I. Initiate and Submit an SPA Form

Initiate a New Scholarship Payment Authorization

Step	Action
1	Open a web browser and go to your campus homepage, or **www.kent.edu**
2	Locate the **FlashLine login fields**, type your FlashLine ID and password.
3	In Flashline, locate and click the **My Action Items** tab.
4	Look for the **Workflow and Utilities** channel. Workflow items are listed alphabetically. Click **Scholarship Payment Authorization**.
5	If you do not see the tab, channel, or link, contact the **Help Desk at 672-4357.** Say, "**I am missing the --- tab in FlashLine"** *(or channel, or link needed.)*

Open a New Authorization Form

Step	Action
1	Click the checkbox "**Begin a New Scholarship Payment Authorization**" to open a blank authorization form. Continue on the next page.

Search for an Authorization in Progress

Step	Action
1	Click the text link "**Click here to search for Historical Scholarship Payment Authorizations**" to look up an authorization in progress.
2	When you submit an authorization, an email is sent confirming that the form is in process, which provides the form Reference Number. (See p.8.)
3	Copy and paste, or type the **Reference Number** of the authorization in the **Workflow Specific Name** field, as in the example above. (Type %SPAF% to view all active forms, if you can't remember the #.)
4	Click **Search**. Search results of one or more forms will appear on the screen. Click a form title to open and view the form information.
Note	To correct a form that has been submitted, contact the form approver. Request that they open the form and click **Return for Rework**.

Identify the Aid Year and Scholarship Name

Step	Action
1	Select the **Aid Year** (the school year in which aid is authorized) by pulling down the **Academic Year** menu of choices. The year code is TTYY, and you will see TT 08 = Fall. For example, **0811** is Fall 2011 or academic year 2011-2012.
2	Select the name of the scholarship to be awarded from the pull-down **Scholarship** menu. The accounting information for the fund will appear to the left of the fund name. (You should only see the names of awards which you are personally authorized to process. Contact Financial Aid if there are errors in this list.)
STOP & CHECK	Confirm that the accounting information associated with the fund is correct. **If you see an error, do not process the form. Contact Financial Aid immediately.** Incorrect information will cause the wrong account to be billed.
Note	**One scholarship** fund, and up to **ten awards** are accomodated per form.

Enter Award Recipient ID(s) and Award Amount(s)

Please enter Banner IDs below. Select an action and enter amounts for terms with two decimal points. Totals will calculate automatically:

	ID	Name	Action
1.	800016051	Mayfield, Trudy	Initial

Step	Action
1	Type the **Banner ID** of an award recipient in the first **ID field**.
2	Press **Tab**. The recipient name should appear in the Name field.
3	Leave the Action column selection set to "Initial".

Amount

Summer 11	Fall 11	Spring 12	Total
	2002.00	2001.00	$4,003.00

Step	Action
4	There are three term periods within a school year. Type the dollar amount of an award into the first appropriate term field.
Note	It is not necessary to type a decimal place and cents figure, as award amounts are in whole dollars. ***Never type a comma in a dollar amount.***
5	Press **Tab**. The amount you typed will appear in the **Total field**.
6	If applicable, click in another term field and type an award amount.
7	Press **Tab**. The Total amount will update.
8	To change a figure, click twice in a field to highlight the dollar amount, and type over a new dollar amount. Press **Tab** to update the Total field.
9	To enter additional recipients for the same scholarship, go back to step 1.

Modify a Previously Awarded Amount or Delete an Award

This option is for **changes after the initial SPAF has been submitted and processed by Student Financial Aid**. If the form has not yet been processed by Financial Aid, contact your form authorizer, and ask them to open the form and click the **Return for Rework** option.

Please enter Banner IDs below. Select an action and enter amounts for terms with two decimal points. Totals will calculate automatically:

	ID	Name	Action
1.	800016051	Mayfield, Trudy	Change

Step	Action
1	Enter the **Banner ID** of the individual whose award is to be revised or deleted.
2	Press **Tab**. The name will appear in the **Name field**.
Note	For revisions and deletions, **indicate the amount to be reflected on the student's award letter**, not the amount of the reduction or increase. For example, if the initial award was for $500 and should be deleted, select **Delete** in the action column and enter "$0.00" in the appropriate award amount field.
3	From the **Action field**, pull down the menu and select **Revised** to modify an existing award; or **Delete** to cancel an award.

Amount

Summer 11	Fall 11	Spring 12	Total
2001.00	2002.00		$4,003.00

Step	Action
4	If the award amount is to be revised, type the new award figure for the first term, and press **Tab** to update the Total field.
5	If applicable, revise the amounts in the other term fields, pressing **Tab** to update the Total field each time.
6	To delete an award, click twice in a field to highlight, and press **Delete**. Press **Tab** to update the Total field.

Submit the Authorization Request

Transaction: $4,003.00

Route For Dean's Approval? Yes
Approver: Mark Sherrod

Submit

Step	Action
1	Some departments and scholarships route approvals through the college Dean. If this option is available, you will see the question above. According to your department policy for the scholarship, select **Yes** to route authorization to the Dean, or **No** to bypass the Dean.
Note	Double-check the entries, because once the form has been submitted, you must call the approver to get it back in order to make corrections.
2	You may enter a comment in the **Additional Comments field**, if desired.
3	Click **Submit** to send the request to the next person in your approver chain.
4	When you Submit the request, the message below will appear, and an e-mail is sent to you which contains the **ID number** of the request.

Need help?

You have successfully submitted this Scholarship Payment Authorization.

A copy of this document can be retrieved from the historical documents view. The historical view can be accessed from the "Workflow & Utilities" channel on the "My Action Items" tab in Flashline.

Scholarship Payment Authorization SPAF000006 for Dr K R Wulff Scholarship-AYR0811   has been submitted
WORKFLOW
To: ALFORD, ELYCIA S
Cc:

Kent State University Workflow Notification

The Scholarship Payment Authorization SPAF000006 for Dr K R Wulff Scholarship has been submitted.

Please save the reference number for future inquiries about this Scholarship Payment Authorization

Reference Number: SPAF000006 — ID #
Creator: Elycia Alford
Scholarship: Dr K R Wulff Scholarship-AYR 0811
Workflow Start: 31-Mar-2011
Total Amount: 4003
Last Action: Submitted For Approval

Correct a SPA Form After Submission

Step	Action
1	To change/correct a form that has already been submitted, contact the **next person in the approval chain**. Ask this person to open the form and click the **Return for Rework** button.
2	The form will appear in your **Worklist** in FlashLine, found on the **My Action Items** tab (above). Click **Open SCT Workflow** to display the worklist (below.) It is easier to scroll and find forms in the full screen Worklist view.
3	Click the form name (under the Workflow column) to open the form and make corrections and comments as necessary. Submit the form in the usual manner. It will return to the approver.

Part 2. Approve an SPA Request

Access the Worklist

Step	Action
1	Approvers receive e-mail notification, as in the example below.
2	Log in to **FlashLine** and click the **My Action Items** tab.
3	Locate the **My Worklist** channel and click **Open SCT Workflow.**

Scholarship Payment Authorization SPAF000004 for Wind Ensemble Scholarship-AYR 0811 has been routed…
WORKFLOW
To: SHERROD, MARK L
Cc:

Kent State University Workflow Notification

The Scholarship Payment Authorization SPAF000004 for Wind Ensemble Scholarship has been routed to you for approval.

Please save the reference number for future inquiries about this Scholarship Payment Authorization.

Reference Number: SPAF000004
Creator: Elycia Alford
Scholarship: Wind Ensemble Scholarship-AYR 0811
Workflow Start: 28-Mar-2011
Total Amount: 100
Last Action: Submitted For Approval

Open a Request Form

Step	Action
1	Forms waiting for approval will display **Approval** in the **Activity column**.
2	Click the form **title** in the **Workflow column** to open and review a form.

Add Comments, Approve or Return

Step	Action
1	• Check amounts and terms for accuracy. • If the Action field indicates **Revise** or **Delete**, the payment amounts have been altered. Totals are automatically calculated.
2	Type a comment if you wish.
3	Choose **Approve** or **Return for Rework**.
4	Select another form in the workflow list, or **Exit** by closing the worklist.
5	If you do not wish to advance the form at this time, Exit without a decision. You may return to the Worklist later to select a decision.