



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	Originator	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

The screenshot shows the Kent State FlashLine portal. The top navigation bar includes links for WFS, My Banner, My Action Items (highlighted with a red box), My Campus, My Courses, Library, Student Career Path, Help, and My Tab. The date is October 8, 2007. The main content area is divided into three columns. The left column contains 'My Banner' (Banner INB, Finance Self-Service Banner, and a note) and 'Time Reporting' (Leave Report). The middle column contains 'Workflow & Utilities' (Utilities: FlashCart, Reporting (Cognos), and Workflow: Electronic PAF, Employee Name Change, Employee Marital Status Change, Employee Education Level Change, Expense Reimbursement, Position Request Authorization, and Scholarship Payment Authorization). The right column contains 'My Worklist' (a table with Workflow Name, Activity, Created, and Details) and 'Helpful Hints' (Access Information and On & Off Campus Access). Arrows point to the 'Reporting (Cognos)' link in the Utilities section and the 'Scholarship Payment Authorization' link in the Workflow section.

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



Name: _____ Submission Date: 4/29/2011
 Organization: Applic Development & Services

Scholarship Payment Authorization

Academic Year:

Need help?

The accounting information associated with this fund:

Scholarship:

If your scholarship is changed is incorrect, please contact Student Financial Aid.

Please enter Banner points. Totals will be for terms with two decimal

		Amount				
ID	Name	Action	Summer 11	Fall 11	Spring 12	Total
1.	<input type="text"/>	<input type="text" value="Initial"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
2.	<input type="text"/>	<input type="text" value="Initial"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
3.	<input type="text"/>	<input type="text" value="Initial"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
4.	<input type="text"/>	<input type="text" value="Initial"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
5.	<input type="text"/>	<input type="text" value="Initial"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
6.	<input type="text"/>	<input type="text" value="Initial"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
7.	<input type="text"/>	<input type="text" value="Initial"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
8.	<input type="text"/>	<input type="text" value="Initial"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
9.	<input type="text"/>	<input type="text" value="Initial"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
10.	<input type="text"/>	<input type="text" value="Initial"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Totals:

Initial/Revised: Delete: Transaction:

Additional Comments (250 Character Maximum):

NOTE: Please do not use the following illegal characters: (*, /, ~, ', - -)

Route For Dean's Approval?

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 TTY, 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.	<input type="text" value="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
<input type="text"/>	<input type="text" value="2002.00"/>	<input type="text" value="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. <i>Never type a comma in a dollar amount.</i>
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.	<input type="text" value="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
<input type="text" value="2001.00"/>	<input type="text" value="2002.00"/>	<input type="text"/>	\$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? <input type="button" value="Yes"/>
Approver: Mark Sherrod
<input type="button" value="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-AYR0811
 Workflow Start: 31-Mar-2011
 Total Amount: 4003
Last Action: Submitted For Approval

Correct a SPA Form After Submission

Welcome to FlashLine

Welcome
You are currently logged in.
[My Account](#) | [Customize Layout](#)

[e-mail](#) [calendar](#) [groups](#) [logout](#) [contact us](#)

[WFS](#) [My HR](#) [My Action Items](#) [My Campus](#) [My Courses](#) [Library](#) [Student Career Path](#) [Help](#) [My Tab](#)

My Banner
Banner INB
Authorized users, access Banner's administrative services from the headline.
Finance Self-Service Banner
Authorized users, access Banner's finance self-service from the headline.
Please note: If your user account has not been granted permission to access certain areas of Banner INB, these links will not work for you.

Workflow & Utilities
Utilities
FlashCart
Tap into this resource for purchasing power.
[Reporting \(Cognos\)](#)

My Worklist

Workflow Name	Activity	Created	Details
SPAF000004: Wind Ensemble Scholarship-AYR 0811	Review	28-Mar-2011 02:44	Details
Ready			
Performing			

[Refresh](#) [Show Entire Worklist](#) [Open SCT Workflow](#)

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.

Home
[Worklist](#)
[Workflow Status Search](#)

User Profile
[Shortcuts](#)
[User Information](#)
[Change Password](#)

Worklist [Logoff](#) [Help](#)

Workflow	Activity	Priority	Created	
SPAF000004: Wind Ensemble Scholarship-AYR 0811	Approval	Normal	28-Mar-2011 02:44:27 PM	Details
Ready				
SPAF000003: Wind Ensemble Scholarship-AYR 0811	Approval	Normal	27-Mar-2011 05:05:19 PM	Details
Ready				
SPAF000002: Wind Ensemble Scholarship-AYR 0811	Approval	Normal	27-Mar-2011 05:05:15 PM	Details
Ready				

[Show Reserved Items](#)

1 - 3 of 3 | [First](#) | [Previous](#) | [Next](#) | [Last](#) | Go to page:

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

Welcome to FlashLine
 You are currently logged in.
[My Account](#) | [Customize Layout](#)

[e-mail](#) [calendar](#) [groups](#) [logout](#) [contact us](#)

[WFS](#) [My HR](#) [My Action Items](#) [My Campus](#) [My Courses](#) [Library](#) [Student Career Path](#) [Help](#) [My Tab](#)

My Banner

Banner INB
 Authorized users, access Banner's administrative services from the headline.

Finance Self-Service Banner
 Authorized users, access Banner's finance self-service from the headline.

Please note: If your user account has not been granted permission to access certain areas of Banner INB, these links will not work for you.

Workflow & Utilities

Utilities

- FlashCart**
 Tap into this resource for purchasing power.
- Reporting (Cognos)**

My Worklist

Workflow Name	Activity	Created	Details
SPAF000004: Wind Scholarship-AYR 0811	Review	28-Mar-2011 02:44	Details
Ready			
Performing			

[Refresh](#) [Show Entire Worklist](#) [Open SCT Workflow](#)

Open a Request Form

Home	Worklist				Logoff	Help																				
Worklist																										
Workflow Status Search																										
User Profile																										
Shortcuts																										
User Information																										
Change Password																										
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Show Reserved Items																										
1 - 3 of 3 First Previous Next Last Go to page: 1																										

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

KENT STATE UNIVERSITY		Name: Elycia S. Alford	Submission Date: 3/31/2011																																																																																																			
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Step	Action
1	<ul style="list-style-type: none"> 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.