

Institutional Awards User Guide

Version 1 – April 9, 2018
BOSTON COLLEGE | OFFICE OF STUDENT SERVICES

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Introduction

Institutional Awards is a component of BC EagleApps that allows departments to add, view, edit and approve departmental awards via a web-based application, accessed via the Portal.

Beginning with the 2018-2019 year, starting with summer 2018, all departmental and athletic awards will be entered via the new Institutional Awards web page. Information for previous years will still be viewable in UBUY. Access to the Institutional Awards system is maintained by Student Services. Similar to UBUY, users will only be able to award funds they are authorized to use.

This document covers:

- New features and changes.
- Navigation.
- Viewing commonly used screens.
- Adding awards.
- Approving or Declining awards.
- Viewing the Approval status of awards.
- Revising awards.
- Processing of awards after approval.

If you have questions about using the Institutional Awards application, please contact the Office Of Student Services.

Glossary of New Features and Functions

Annualized Awards: In Institutional Awards, a department may elect to award a student an amount for a group of two or more terms at once, before knowing their actual enrollment and charges. Annualized awards allow any portion of the award that is unspent in a term, to 'float' to the next term. This may be useful for departments who prefer to make an award for the year, rather than term by term.

Budget - Commitment vs. Actual: Institutional Awards allows for the concept of tolerance, so that a department may award an amount in excess of the actual budget, based on the assumption that not all students offered funds will enroll (yield). Thus, it is possible for the Commitment Budget to exceed the actual budget amount available for the fund, by using a percentage (example 105%, Actual Budget \$100,000, Commitment Budget \$105,000). Funds will only be disbursed up to the actual budget amount. All Budget figures and tolerances are determined by the Financial Vice President's Office.

Dollar Amount: Awards are entered as a **dollar amount**, rather than as the number of credits. If the department wishes to give a student a tuition remission award to cover a certain number of credits, it will be necessary to calculate the award amount based on the number of credits a department wishes to cover multiplied by the per credit rate for the student's school.

Fee-based vs Fixed Award Type: The vast majority of funds are fee-based, meaning that they will only disburse up to the amount of the fees being considered. In most cases, the funds cover tuition, but there are some funds that cover medical insurance or other costs. Fee-based funds will only disburse up to the amount awarded or the fees assessed for the term, whichever is lower. Fixed funds are awarded regardless of costs, and will disburse as long as the student is enrolled, regardless of charges assessed.

Full Scholarship box: The Full Scholarship box applies and is visible only when awarding athletic funds. It is used to designate cases where a full scholarship is being offered, as defined by NCAA. In these cases, there are specific rules that apply to other aid the student may be receiving, such as state aid and outside aid.

Fund versions: In most cases, funds are now available to be awarded for any term, including summer and the academic year, eliminating the need for a summer version and a different version for the academic year. Exceptions exist for athletic and certain other term specific funds.

One Award Record: In Institutional Awards, there is a single award record for the combination of a student, fund and year. For example, if an award is created for fall only, and the department later wishes to award an amount for summer or spring, the existing record for fall must be edited to add the summer and/or spring amount.

Prioritization: In Institutional Awards we are able to specify a priority for each fund that governs which funds will spend first, in cases where a student is the recipient of multiple departmental awards. The disbursement priority for each type of fund was determined by the Financial Vice President's Office.

ProSAM: ProSAM is the Financial Aid Management system used by Boston College. Institutional Awards, used for the awarding of departmental and athletic aid, is a module within ProSAM. All data entered and displayed on the Institutional Awards website is maintained in ProSAM.

General Navigation

Portal Access

Institutional Awards is accessed via the **Institutional Awards** link under Student Financial Services in the Portal. Only users who are authorized to create, approve, or view awards in Institutional Awards will have the Portal link.

Institutional Awards Menu items

The screenshot shows the 'Financial Awards' section of a web application. At the top left, the text 'Financial Awards' is displayed. To the right, a navigation menu is highlighted with a red border, containing the following items: 'Fund Summary', 'Fund Search', 'Student Summary', and 'Pending Approvals' with a red notification badge containing the number '8'. Below the menu is a dark grey search bar with the text 'SEARCH FOR STUDENT' and a search input field containing the placeholder text 'Search student name or id' and a magnifying glass icon. Below the search bar is a table with the following headers: 'Eagle ID', 'Name', 'Department', 'Start Year', 'End Year', 'Date of Birth', and 'Actions'. Below the table headers, the text 'No Record Found' is displayed.

Fund Summary

Fund Summary will return a list of all funds that the user is authorized to access, along with a summary of key details about each fund, including the Actual and Commitment Budget, the amount Awarded, Spent, Unspent and Available for each fund. This view will return all funds for which the user is authorized.

Fund Search

Fund Search allows the user to search for a particular fund, based on the fund ID (AID ID) or key words or letters in the fund description.

Student Search

Student Search allows the user to search for a particular student, based on the student's Eagle ID, or name. For common names, it is best to restrict the search if possible, by adding the first name (format is Last,First), or the first few letters of the first name.

Pending Approvals

Pending Approvals allows the user to view awards awaiting their approval (My Approvals), as well as awards created by the user that are awaiting approval from someone else (All Approvals).

Viewing Funds

The **Fund Summary** displays any funds you are authorized to access. Clicking on the **Fund Summary** menu option will return all funds. Caution is recommended with the **Fund Summary** option. Depending on the number of funds you are authorized to use, it may take several minutes for the list to complete. If you are authorized to use a large number of funds, it may save time to search using the **Fund Search** option.

The **Fund Search** option allows the user to search for a fund based on the **Fund ID**, or keywords in the **Fund Name**. **Fund IDs** are 4 characters, and most are very similar to the names in UBUY. Click the magnifying glass icon on the right to initiate the search.

Financial Awards

[Fund Summary](#) [Fund Search](#) [Student Summary](#) [Pending Approvals](#) 0

SEARCH BY FUND

Aid Year: 2017-2018 ▼

Fund ID	Fund Name	Actual Budget	Commitment Budget	Awarded	Spent	Unspent	Available	Actions
GB11	LSOE Tuit Traineeshp	\$100,000	\$100,000	\$0	\$0	\$0	\$100,000	↶ +
GB12	LSOE Tuit Traineeshp	\$100,000	\$100,000	\$26,330	\$26,330	\$0	\$73,670	↶ +
GC67	LSOE Tuit Traineeshp	\$100,000	\$100,000	\$20,000	\$11,360	\$8,640	\$80,000	↶ +
GD01	LSOE Warmenthoven Program	\$0	\$0	\$0	\$0	\$0	\$0	↶
GD08	LSOE Boisi Chair MA Scholarship	\$34,080	\$34,080	\$0	\$0	\$0	\$34,080	↶ +
GD09	LSOE Catholic Leader MA TR	\$217,260	\$217,260	\$0	\$0	\$0	\$217,260	↶ +
GD21	LSOE Grad MA TR	\$1,107,600	\$1,107,600	\$20,000	\$5,325	\$14,675	\$1,087,600	↶ +
GD31	LSOE Donovan Assistantship	\$871,880	\$871,880	\$0	\$0	\$0	\$871,880	↶ +
GD66	LSOE Education Voucher	\$11,000	\$11,000	\$12,220	\$11,000	\$1,220	(\$1,220)	↶
GD75	LSOE Donovan Scholar MA Aid	\$871,880	\$871,880	\$44,140	\$34,790	\$9,350	\$827,740	↶ +

Total items:29

First < 1 2 3 > Last

Items per page: 10 20 50

Fields include:

- **Actual Budget:** the total actual amount available to award.
- **Commitment Budget:** the amount available after tolerance (for example, your awards may be granted a percentage over the actual budget for purposes of awarding, however the spent amount cannot exceed the actual budget.)

- **Awarded:** dollar amount that has been allocated to students.
- **Spent:** dollar amount that has been disbursed to students.
- **Unspent:** dollar amount that has been awarded, but not yet disbursed.
- **Available:** dollar amount available to be awarded.
- **Actions:** icons include View Details and Add/Edit awards.

You can move from page to page by using the **First** and **Last** buttons, selecting a page number, or using the arrows located at the bottom of the screen. You can also choose how many records to display per page. These options appear on any page, whenever more than 10 records are returned.

Fund Details

Select the Fund ID or Fund Name to view more details.

LSEO Donovan Scholar MA Aid

Fund Id **GD75**
 Aid Year **2017-2018**
 Term **All Terms**

AWARDS

Award Summary	
Actual Budget	\$871,880
Effective Budget After Tolerance	\$871,880
Available to Award	\$823,240
Spent	\$34,790
Awarded but not Spent	\$13,850
Awarded	\$48,640

[ADD AWARD](#)

Eagle ID	Name	Department	Awarded	Spent	Unspent	Actions
[Redacted]	[Redacted]	[Redacted]	\$24,140	\$24,140	\$0	 
[Redacted]	[Redacted]	[Redacted]	\$20,000	\$10,650	\$9,350	 
[Redacted]	[Redacted]	[Redacted]	\$4,500	\$0	\$4,500	

Total items:3

Items per page: 10 20 50

This screen provides a breakdown of all awards by student.

Action icons display on the right:



Edit - Allows you to edit an award after it has been fully approved.



View - Displays the details of that particular award.



Pending Approval - Indicates that the award is awaiting approval. Awards that are in Pending Approval status cannot be modified until they have been fully Approved or Declined.

Viewing Student Summary

Select the **Student Summary** option to search by student. **Search for Student** allows you to search for a student using the Eagle ID or name. If you search by name, all results display. If you are searching by name, and you expect there to be a large number of students with the last name, it is advisable to add the first name or the first few letters of the first name in order to narrow the search.

If there are too many records for the search, you may see a “No Record Found” message:

The screenshot shows the 'Financial Awards' page with navigation links: Fund Summary, Fund Search, Student Summary, and Pending Approvals (9). A search bar titled 'SEARCH FOR STUDENT' contains the text 'murphy' and a search icon. Below the search bar is a table with the following columns: Eagle ID, Name, Department, Start Year, End Year, Date of Birth, and Actions. The table contains the text 'No Record Found'.

Narrowing the search by adding the first initial or some portion of the first name, should provide better results:

The screenshot shows the 'Financial Awards' page with navigation links: Fund Summary, Fund Search, Student Summary, and Pending Approvals (9). A search bar titled 'SEARCH FOR STUDENT' contains the text 'murphy,kathleen' and a search icon. Below the search bar is a table with the following columns: Eagle ID, Name, Department, Start Year, End Year, Date of Birth, and Actions. The table contains two records:

Eagle ID	Name	Department	Start Year	End Year	Date of Birth	Actions
	Murphy,Kathleen					← +
	Murphy,Kathleen M					← +

At the bottom of the page, it shows 'Total items:2' and 'Items per page: 10 20 50'.

Student Details

To view the details for that student, click on either the **Eagle ID, Name**, or the **View Details** button  under the **Actions** column.

Financial Awards

[Fund Summary](#) [Fund Search](#) [Student Summary](#) [Pending Approvals](#)

← BACK TO SUMMARY

Kathleen Murphy



Eagle Id [REDACTED]

Department(s) [REDACTED]

Address [REDACTED]

Date of Birth [REDACTED]

Gender **Female**

AWARDS

Aid Year 2017-2018

Award Summary (2017-2018)

Total Awards \$17,000

Awards Spent \$10,000

Awards Unspent \$7,000

Aid Year	Fund ID	Fund Name	Awarded	Spent	Unspent	Actions
2017-2018	BA15	Women's Tennis Schishp	\$5,000	\$0	\$5,000	
2017-2018	GT27	LSOE Urban Catholic Teacher Corps MA Aid	\$12,000	\$10,000	\$2,000	 

ADD AWARD

The screen displays:

- The student's demographic info (**Name, Eagle ID, Date of Birth**, etc.).
- A drop-down field to choose the **Aid Year** you want to review.
- The Award Summary (**Total Awards, Awards Spent, and Awards Unspent**).
- A detailed breakdown, by **Aid Year**, of the award(s) for that student.
- All awards that the student has been offered via Institutional Awards will display, including funds awarded by other departments, if any. You will only be able to Edit awards for funds for which you are an authorized user.

Adding Awards

Awards can be added in two ways. You can select a fund first, and then search for the student or you can search for the student first and then add an award by selecting the fund from a drop down.

Add an Award by Selecting the Fund

1. Search for and select the appropriate Fund by selecting **Fund Summary** from the menu, and then input Search criteria following the steps on pages 7-8. The Fund Summary page will display all funds meeting the criteria. Select the fund you wish to award to view the **Fund Detail** page.
2. From the **Fund Detail**, click the **Add Award** button.

L SOE Tuitt Traineeshp

Fund Id GC67
 Aid Year 2017-2018
 Term All Terms

AWARDS

Award Summary	
Actual Budget	\$100,000
Effective Budget After Tolerance	\$100,000
Available to Award	\$80,000
Spent	\$11,360
Awarded but not Spent	\$8,640
Awarded	\$20,000



Eagle ID	Name	Department	Awarded	Spent	Unspent	Actions
			\$20,000	\$11,360	\$8,640	 

Total items:1

Items per page: 10 20 50

- The **Add Award** page displays. The Fund will be pre-populated based on your earlier selection. Click the search icon next to the **Student Name** field.

Add Award

Student Id

Student Name  

Aid Year

Fund

Available to award Unspent

- Enter the student's name or Eagle ID and select the **search** button. The student's info displays.

SEARCH FOR STUDENT

Eagle ID	Name	Department	Start Year	End Year	Date of Birth	Actions
387	Jones,					<div style="background-color: #333; color: white; padding: 2px; font-size: 8px;">Select Student</div>  

Total items: 1

Items per page:

- To select the student, click the Eagle ID, Name, or the **Select Student** icon.



6. The **Add Award** page displays. Enter the **Award Amount**.

Add Award

Student Id Student Name

Aid Year

Fund

Available to award Unspent

Award Amount

7. As you enter the **Award Amount**, additional fields display:

Add Award

Student Id Student Name

Aid Year

Fund

Available to award Unspent

Award Amount

Award Type

Award Limits Academic Year

Summer

Fall

Spring

The **Award Type** will be pre-populated based on the type of fund. The vast majority of funds are **Fee Based** rather than **Fixed**.

Athletic funds will also have a **Full Scholarship** option. Please see further information about awarding Athletic funds at the end of this manual.

Enter the Award Amount.

- Leaving the default **Academic Year** option checked will create an **Annualized** award. **Annualized** awards allow the user to create an award that will be spread out over the terms based on the student’s charges. For an Annualized award, any funds not used (unspent) in a given term, will automatically “float” to the next term.
- For **non-Annualized** awards, uncheck the **Academic Year** option, and then specify an amount for each term. The sum of the term amounts must equal the **Award Amount**.
- Further details and examples of Annualized vs. non-Annualized awards appear at the end of this manual.

For either option, if you do not want funds awarded for a certain term, or wish to limit the amount the student may receive in a term, simply enter a specific amount for that term. In the example of an annualized award below, summer is limited to a maximum of \$500. The amount entered acts as a cap for that term, so in this case funds will disburse for the summer up to the tuition charges for the summer, or \$500, whichever is less. The remaining \$2500 will be available for fall and spring terms. In this case, because it is an Annualized award, if the tuition charges for summer are less than \$500, any remaining funds from the summer will float to the next term and will be available for the fall.

The screenshot shows a form for entering award details. At the top, the 'Award Amount' is set to '\$3,000'. Below this, the 'Award Type' is a dropdown menu currently showing 'Fee Based'. Under the 'Award Limits' section, the 'Academic Year' checkbox is checked. There are three rows for term limits: 'Summer' with a checked checkbox and a value of '\$500'; 'Fall' with an unchecked checkbox and a value of '(auto)'; and 'Spring' with an unchecked checkbox and a value of '(auto)'. At the bottom left of the form is an 'Add Comment' button.

7. If desired, use the **Add Comment** function to enter additional information about the award (such as a Voucher number). Please note that any comments entered will appear

in the **Approval details** for the 2nd Approver, but will no longer be visible on the website once the award is fully approved. All comments are captured in ProSAM.

Add Award

Student Id Student Name

Aid Year

Fund Available to award Unspent

Award Amount

Award Type

Award Limits Academic Year

Summer

Fall

Spring

Test Comment for 2nd Approver



8. Click the **Add Award** button in the lower right

A confirmation message displays:



Add Award

Student Id Student Name

Aid Year

Fund Available to award Unspent

Award Amount

Award Type

Award Limits

- Academic Year
- Summer
- Fall
- Spring

NOTE: If you made an error, the award can only be edited after it has been approved or declined. You may wish to contact the approver to let him or her know, and they can either Approve or Decline it as needed. You may then edit it, and resubmit it for approval.

9. On the confirmation page, select the **Back** button on the top left in order to return to the **Fund Detail** page, and add another award for this fund. You will now see the award you just entered listed for the student along with any other awards for this fund.
10. The newly created award will appear in Pending status, indicated by the  icon in the Actions column, and the award cannot be modified until it has been Approved or Declined.

Add an Award by Selecting the Student

1. Search for and select the appropriate Student by selecting **Student Summary** from the menu. Enter the student's last name or Eagle ID in the **Search for Student** field and press the search button. If more than one student matches the search, a list displays.

Please refer to the full Student Search steps on page 9.

Select the student you wish to award to view the **Student Detail** page.

SEARCH FOR STUDENT

Eagle ID	Name	Department	Start Year	End Year	Date of Birth	Actions
	O'Neill, Al					⏪ +
	O'Neill, Ar					⏪ +
	O'Neill, Au					⏪ +
	O'Neill, Ay					⏪ +
	O'Neill, Br					⏪ +
	O'Neill, Br					⏪ +
	O'Neill, B					⏪ +
	O'Neill, E					⏪ +
	O'Neill, B					⏪ +
	Oneill, Ca					⏪ +

Total items: 119

First < 1 2 3 4 5 > Last

Items per page: 10 20 50

2. To select the student, click the Eagle ID, Name, or the **Select Student** icon.

3. The page with the student's info displays. Select the **Add Award** button

- The student's ID and Name will be pre-populated based on your selection. Select the appropriate fund from the **Fund** drop-down field. You will only be able to see funds that you are authorized to use, and that have a remaining budget greater than zero (i.e. available to be awarded).

Add Award

Student Id Student Name

Aid Year

Fund

Select a Fund to Add Commitment

(BE17) Sharp Urban Scholarship

(GB11) LSOE Tuit Traineeshp

(GB12) LSOE Tuit Traineeshp

(GC67) LSOE Tuit Traineeshp

(GD06) MA Counseling Pysch TR

(GD08) LSOE Boisi Chair MA Scholarship

(GD09) LSOE Catholic Leader MA TR

(GD21) LSOE Grad MA TR

(GD31) LSOE Donovan Assistantship

(GD75) LSOE Donovan Scholar MA Aid

(GD95) LSOE PSAP Assitant PhD TR

(GD97) LSOE Brennan Endowed Chair MA Aid

(GE18) LSOE William Keough Mem MA Sch

(GE22) LSOE Catholic Leadership MA FLSP

(GE25) LSOE Christine Martin MA Schol

(GE32) LSOE Gift Masters AY

(GE34) LSOE Lam Family Grad MA Fellowship

(GE39) LSOE Suz Geneste Dreyer MA Sch

(GE54) LSOE Fruscione MA Fellowship

- The **Add Award** page displays. Enter the **Award Amount**.

Add Award

Student Id Student Name

Aid Year

Fund

Available to award Unspent

Award Amount

6. As you enter the **Award Amount**, additional fields display:

Add Award

Student Id Student Name

Aid Year

Fund Available to award Unspent

Award Amount

Award Type

Award Limits Academic Year

Summer

Fall

Spring

The **Award Type** will be pre-populated based on the type of fund. The vast majority of funds are **Fee Based** rather than **Fixed**.

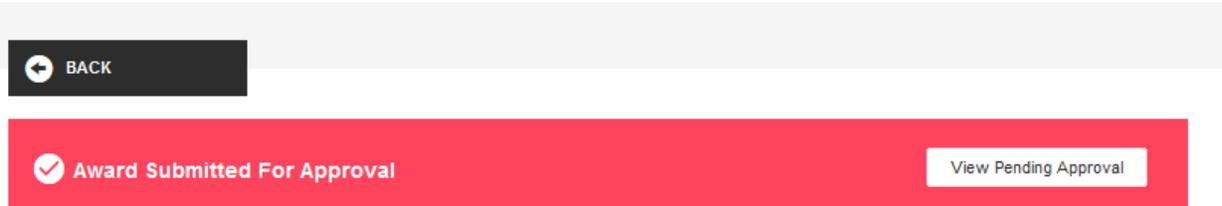
Athletic funds will also have a **Full Scholarship** option. Please see further information about awarding Athletic funds at the end of this manual.

Enter the Award Amount.

- Leaving the default **Academic Year** option checked will create an **Annualized** award. **Annualized** awards allow the user to create an award that will be spread out over the terms based on the student's charges. For an Annualized award, any funds not used (unspent) in a given term, will automatically float to the next term.
- For **non-Annualized** awards, uncheck the **Academic Year** option, and then specify an amount for each term. The sum of the term amounts must equal the **Award Amount**.
- Further details and examples of Annualized vs. non-Annualized awards appears at the end of this manual.

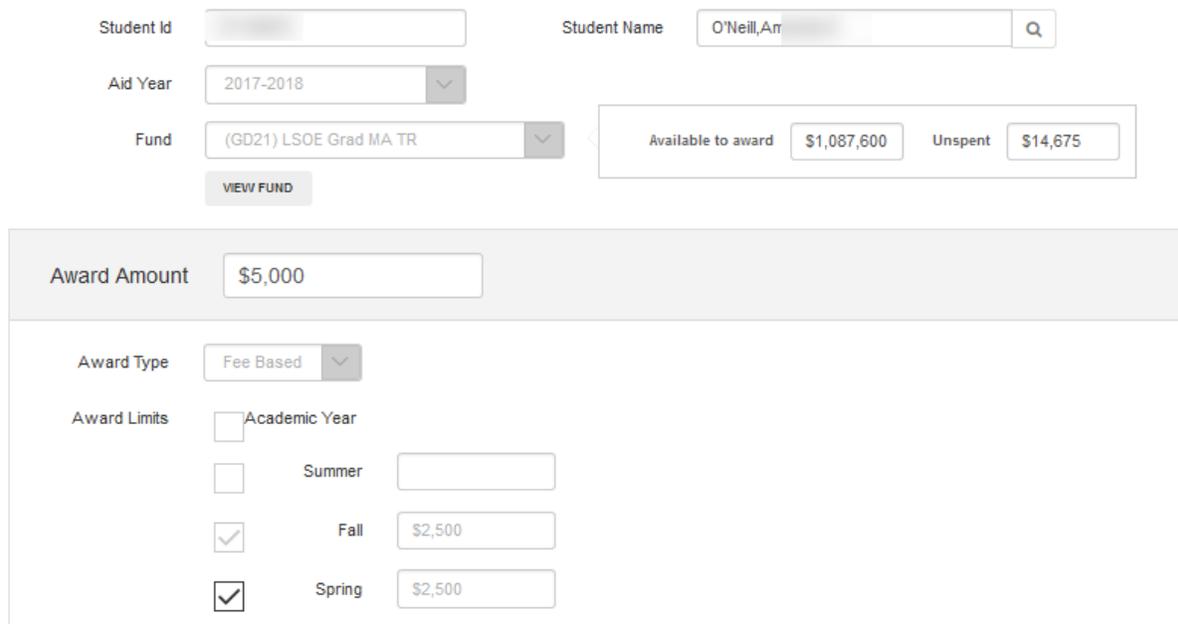
7. Click the **Add Award** button in the lower right.

A confirmation message displays:



A confirmation message banner with a red background. On the left, there is a black button with a white left-pointing arrow and the text "BACK". In the center, there is a white checkmark icon followed by the text "Award Submitted For Approval". On the right, there is a white button with the text "View Pending Approval".

Add Award



The "Add Award" form contains the following fields and options:

- Student Id:** A text input field.
- Student Name:** A text input field containing "O'Neill, An" and a search icon.
- Aid Year:** A dropdown menu showing "2017-2018".
- Fund:** A dropdown menu showing "(GD21) LSOE Grad MA TR".
- VIEW FUND:** A button located below the Fund dropdown.
- Summary:** A box showing "Available to award \$1,087,600" and "Unspent \$14,675".
- Award Amount:** A text input field containing "\$5,000".
- Award Type:** A dropdown menu showing "Fee Based".
- Award Limits:** A section with four rows:
 - Academic Year
 - Summer [text input field]
 - Fall [text input field containing "\$2,500"]
 - Spring [text input field containing "\$2,500"]

NOTE: If you made an error, the award can only be edited after it has been approved or declined. You may wish to contact the approver to let him or her know, and they can either Approve or Decline it as needed. You may then edit it, and resubmit it for approval.

7. On the confirmation page, select the **Back** button  on the top left in order to return to the **Student Detail** page, in order to add another award for this student. You will now see the award you just entered listed for the student.

[← BACK TO SUMMARY](#)

A [REDACTED] O'Neill



Eagle Id [REDACTED]
Department(s) [REDACTED]

Address [REDACTED]
Date of Birth [REDACTED]
Gender **Female**

AWARDS

Aid Year 2017-2018

Award Summary (2017-2018)

Total Awards

Awards Spent

Awards Unspent

Aid Year	Fund ID	Fund Name	Awarded	Spent	Unspent	Actions
2017-2018	GD21	LSOE Grad MA TR	\$5,000	\$0	\$5,000	!

[ADD AWARD](#)

- If you need to add another award for this student, click the **Add Award** button in the lower right. If you are finished awarding this student, click the **Back to Summary** button in the upper left in order to return to the **Search for Student** page.

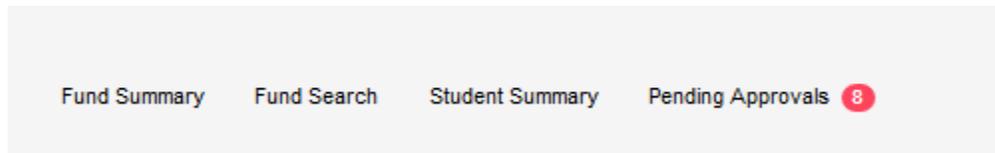
Viewing Pending Approvals

If you have access to approve awards, you will be able to view awards awaiting approval in the Pending Approvals section. Select the **Pending Approvals** option to view awards awaiting approval. The **My Approvals** option displays awards created or modified by another user in your department, that are awaiting your approval. The **All Approvals** option displays all awards awaiting approval for your department, including those that you created.

Approving Awards

Follow these steps to approve pending awards. You will only be able to do so if you are authorized to approve awards for your department. A user cannot act as the 2nd approver for awards they created.

1. If you have any pending approvals (for awards created by another user), the number of pending approvals awaiting your attention will display in the upper right area of your screen.



2. Click Pending Approvals
3. A list of all your pending approvals displays. The list may be sorted or filtered by clicking on items in the menu bar, or inputting an Eagle, ID, Fund ID, or other criteria in the Filter box.

Pending Approvals 8

MY APPROVALS ALL APPROVALS

Filter

List sorted by Fund ID

<input type="checkbox"/>	+	Eagle ID	Name	Fund ID	Fund Name	Year	Term(s)	Original	Change	Result	Actions
<input type="checkbox"/>	+			GD41	DSW Social Work PhD TR	2017-2018	Multiple	\$0	\$25,000	\$25,000	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GD50	CSOM Grad Management MA TR	2017-2018	Multiple	\$0	\$30,000	\$30,000	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GD66	LSOE Education Voucher	2017-2018	Multiple	\$0	\$12,780	\$12,780	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GE48	SW Hyman Bessie Litwack MA Fellowship	2017-2018	Multiple	\$0	\$4,000	\$4,000	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GH19	A&S English PhD Tut Remission	2017-2018	Multiple	\$0	\$28,296	\$28,296	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GM03	SW Medical Insurance Credit	2017-2018	Multiple	\$0	\$3,088	\$3,088	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GM04	CSOM Medical Insurance Credit	2017-2018	Multiple	\$0	\$3,088	\$3,088	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GM06	A&S Medical Insurance Credit	2017-2018	Multiple	\$0	\$3,088	\$3,088	<input checked="" type="checkbox"/> <input type="checkbox"/>

Total items: 8

Items per page:

- 4. To view the details of an award, select the “plus” sign (+) next to that award. To view the details of all awards, click on the “plus” sign (+) in the menu bar. Additional details for the award will display.

The detail displays the breakdown of that particular award by semester. **Approval List** shows the status of the award in the approval process, and who has already approved it.

Review the award, and click the checkbox in the upper left to select the award to be approved. Then click the **Approve Selected** button in the lower right, or the  icon under Actions in the upper right, to approve.

Pending Approvals 8

MY APPROVALS ALL APPROVALS

<input type="checkbox"/>	Eagle ID	Name	Fund ID	Fund Name	Year	Term(s)	Original	Change	Result	Actions
<input checked="" type="checkbox"/>			GD41	DSW Social Work PhD TR	2017-2018	Multiple	\$0	\$25,000	\$25,000	 

DETAILS (Last Modified on 2018-03-20 at 17:10:23)

Add	Fund ID	Fund Name	Year	Term(s)	Original	Change	Result
	GD41	DSW Social Work PhD TR	2017-2018	Summer	\$0	\$4,736	\$4,736
	GD41	DSW Social Work PhD TR	2017-2018	Fall	\$0	\$10,132	\$10,132
	GD41	DSW Social Work PhD TR	2017-2018	Spring	\$0	\$10,132	\$10,132

APPROVAL LIST

Approvals	Status	Date	Approver
<input checked="" type="checkbox"/> Approver 1	Approved	March 20, 2018	Knost,John
<input type="checkbox"/> Approver 2	Required		

COMMENTS

Approver 1

Total items:1

Items per page:

- If the person who created the award added a comment, it would appear in the “Requester” box at the bottom of the detail:

<input type="checkbox"/>	Eagle ID	Name	Fund ID	Fund Name	Year	Term(s)	Original	Change	Result	Actions
-			GC67	LSOE Tuit Traineeshp	2017-2018	Multiple	\$0	\$3,000	\$3,000	

DETAILS (Last Modified on 2018-03-07 at 22:47:21)

Add	GC67	LSOE Tuit Traineeshp	2017-2018	Summer	\$0	\$500	\$500
Add	GC67	LSOE Tuit Traineeshp	2017-2018	Fall	\$0	\$1,250	\$1,250
Add	GC67	LSOE Tuit Traineeshp	2017-2018	Spring	\$0	\$1,250	\$1,250

APPROVAL LIST

Approvals	Status	Date	Approver
<input checked="" type="checkbox"/> Approver 1	Approved	March 7, 2018	Lezberg, Joyce
<input type="checkbox"/> Approver 2	Required		
<input type="checkbox"/> Approver 3	Required		

COMMENTS

Requester

Test_Comment_for_2nd_Approver

Approver 1

AUTO APPROVAL DESCRIPTION

- The **Approve** window displays. The **2nd Approver** may add a comment here.

APPROVE x

INCLUDE COMMENT (OPTIONAL)

Comment added by 2nd Approver

Comment will be included on all selected approvals

Cancel Submit

- Click the **Submit** button. The award is approved.

8. **Once the award has been fully approved, any comments submitted by the Requester/1st Approver, or 2nd Approver, will only be viewable in ProSAM and not in this application.** If it is necessary to check the details (comments or who approved and when) for previously approved awards, please contact Student Services for assistance.
9. Once an award has been approved, it can be viewed or edited by searching for the student in Student Summary, or by viewing the Fund detail and selecting the student from the list of students awarded that fund.

Declining Awards

Follow these steps to decline an award.

1. Follow steps 1 - 3 on page 24 to display the award.
2. Select the award to be declined by clicking the checkbox in the row containing the award.
3. Decline the selected award by clicking the  icon under Actions on the right, or by clicking the Decline Selected button on the lower right.

Pending Approvals 8

MY APPROVALS ALL APPROVALS

<input type="checkbox"/>	+	Eagle ID	Name	Fund ID	Fund Name	Year	Term(s)	Original	Change	Result	Actions
<input type="checkbox"/>	+			GD41	DSW Social Work PhD TR	2017-2018	Multiple	\$0	\$25,000	\$25,000	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GM04	CSON Medical Insurance Credit	2017-2018	Multiple	\$0	\$3,088	\$3,088	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GD50	CSOM Grad Management MA TR	2017-2018	Multiple	\$0	\$30,000	\$30,000	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	+			GE48	SW Hyman Bessie Litwack MA Fellowship	2017-2018	Multiple	\$0	\$4,000	\$4,000	<input checked="" type="checkbox"/> <input type="checkbox"/> Decline
<input type="checkbox"/>	+			GM06	A&S Medical Insurance Credit	2017-2018	Multiple	\$0	\$3,088	\$3,088	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GH19	A&S English PhD Tut Remission	2017-2018	Multiple	\$0	\$28,296	\$28,296	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GD66	LSOE Education Voucher	2017-2018	Multiple	\$0	\$12,780	\$12,780	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+			GM03	SW Medical Insurance Credit	2017-2018	Multiple	\$0	\$3,088	\$3,088	<input checked="" type="checkbox"/> <input type="checkbox"/>

Total items: 8 Items per page:

DECLINE SELECTED

APPROVE SELECTED

3. The **Decline** window displays. **Any comments submitted will only be viewable in ProSAM and not in this application.**

DECLINE SELECTED x

INCLUDE COMMENT (OPTIONAL)

Comment will be included on all selected approvals

CancelSubmit

4. Click the **Submit** button. When an award is declined, the amount will revert back to the prior amount (0 for a new award, or the previously approved amount for an award that was modified).

5. **Once the award has been declined, any comments submitted by the Requester/1st Approver, or 2nd Approver, will only be viewable in ProSAM and not in this application.** If it is necessary to check the details (comments or who approved and when) for previously approved awards, please contact Student Services for assistance. Once an award has been declined, no further action is needed (i.e. if it required a 3rd approval, but the 2nd approver declined the award, nothing further is needed).

6. After the award has been declined, it can be viewed or edited by searching for the student in Student Summary, or by opening the Fund and finding the student in the list of awards for that Fund.

Approving or Declining Multiple Awards

1. It is possible to Approve or Decline multiple awards at the same time, by clicking the box in the header row, which will automatically check the boxes for all awards listed on the page. The Filter may be used to restrict the awards that will display. Once all awards are selected, click the Approve Selected (or Decline Selected) button in the bottom right corner of the screen.

Financial Awards

[Fund Summary](#) | [Fund Search](#) | [Student Summary](#) | [Pending Approvals 8](#)

Pending Approvals 8

[MY APPROVALS](#) | [ALL APPROVALS](#)

A&S

<input checked="" type="checkbox"/>	+	Eagle ID	Name	Fund ID	Fund Name	Year	Term(s)	Original	Change	Result	Actions
<input checked="" type="checkbox"/>	+			GM06	A&S Medical Insurance Credit	2017-2018	Multiple	\$0	\$3,088	\$3,088	✓ ✗
<input checked="" type="checkbox"/>	+			GH19	A&S English PhD Tuit Remission	2017-2018	Multiple	\$0	\$28,296	\$28,296	✓ ✗

Total items: 2

Items per page: 10 20 50

DECLINE SELECTED

APPROVE SELECTED

You can approve or decline multiple awards simultaneously. The Filter box may be used to restrict the list to the awards you wish to Accept or Decline. Using the Filter box, you can restrict the list to a particular fund, group of funds, or student.

Select the checkbox next to the awards you want to approve or decline, and then select the **Decline Selected** or **Approve Selected** button in the bottom right corner of the screen.

You can also select the checkbox at the very top of the screen to select all the awards displayed on the page and decline or approve them all.

Editing Awards

After an award has been approved or declined, it can be edited. **Awards in Pending status cannot be edited.**

1. Search for the award either by student or by fund, then select the Edit button in the Actions column.

LSOE Tuit Traineeshp

Fund Id GC67
 Aid Year 2017-2018
 Term All Terms

AWARDS

Award Summary			
Actual Budget	<input type="text" value="\$100,000"/>	Spent	<input type="text" value="\$11,360"/>
Effective Budget After Tolerance	<input type="text" value="\$100,000"/>	Awarded but not Spent	<input type="text" value="\$11,640"/>
Available to Award	<input type="text" value="\$77,000"/>	Awarded	<input type="text" value="\$23,000"/>

[ADD AWARD](#)

Eagle ID	Name	Department	Awarded	Spent	Unspent	Actions
[Redacted]	[Redacted]		\$3,000	\$0	\$3,000	[Info] [Edit]
[Redacted]	[Redacted]		\$20,000	\$11,360	\$8,640	[Edit]

Total items:2

Items per page: 10 20 50

2. The Edit Award box will display showing the current Award Amount and term breakdown. Make whatever changes you need to make, then click the Edit Award button.

- If the Award Amount is changed, and the sum of the term amounts is greater than the Award Amount listed, an error message will display:

Edit Award

Student Id Student Name Da

Aid Year

Fund Available to award Unspent

Award Amount Amount changed from \$20000 to

Award Type

Award Limits Academic Year

Summer

Fall

Spring

Error message is displayed because sum of term amounts (5000+10000+5000=\$20,000) does not equal \$18,000. Award Amount or Term amounts

Term limits do not total Award Amount

Special Note: If the Award Amount is greater than the sum of the Term amounts listed, no error message will display, but the user will not be able to click the Edit Award button.

- Once amounts have been corrected, click the **Edit Award** button in the lower right. A message displays confirming that the edited award was submitted for approval.

Award Submitted For Approval

Processing of Awards after Approval

Institutional Awards is a component within ProSAM, the Financial Aid Management system. Once an award has been fully approved, there are several steps that occur in ProSAM before the award will be disbursed, and appear on the student's account.

1. For all types of awards, a 'pre-packager' batch job is run that has several functions:
 - a. It assesses whether or not the student has other aid.
 - i. If the student does have aid, particularly any type of financial aid awarded by the Office of Financial Aid, the student will appear on a worklist for counselor review. At that point, the processing of all aid ceases until the counselor has reviewed the student's financial aid package, and determined whether or not changes are needed. Once that process is complete, the counselor will note that and processing will continue. The pre-packager batch job will assess the student's charges for each term in order to determine the amount to be disbursed. This is similar to the Financial Aid approval process in UBUY.
 - ii. If the student has no other aid, or only has other aid awarded via Institutional Awards, then processing continues on to the next step.
 - b. For fee-based awards, the pre-packager also assesses the student's charges for each term, in order to determine what amount, if any, should be disbursed for the term(s). For tuition remission awards, the amount of the tuition charges for the term, less any tuition adjustments or other tuition remission or tuition benefit awards, are assessed, and the lesser of the net tuition charged or the term award amount will be disbursed.
 - c. The pre-packager is run on a regular basis, and evaluates the student charges, and reassesses the award amount each time it is run. If a student's enrollment should change, resulting in a change to the charges (increase or decrease), the disbursement will be automatically adjusted based on the student's current charges, up to the amount of the award.
2. When it is time for the funds to disburse, a disbursement job is run in order to disburse the funds and apply them to the student's account. The amount disbursed is based on the amount determined in the 'pre-packager' step, assuming that the student is enrolled.
3. After an award has been fully approved, you will no longer be able to see the details of the approvals on the Institutional Awards website. All of the details are captured in ProSAM, so if you need to identify what happened, when, and by whom, the Office of Student Services can research it for you.

Awarding Athletic Funds

Full Scholarship athletes

1. Athletic aid is awarded the same way as other types of aid. The key difference is the presence of a “Full Scholarship” check box.
2. Select a student and a Fund:

Add Award

The screenshot shows a web form for adding an award. It includes the following elements:

- Student Id:** A text input field.
- Student Name:** A text input field with the value "Sha" and a search icon.
- Aid Year:** A dropdown menu with "2017-2018" selected.
- Fund:** A dropdown menu with "(BA13) Women's Softball Schlishp" selected.
- VIEW FUND:** A button below the Fund dropdown.
- Summary Box:** A box containing "Available to award" with a value of "\$834,696" and "Unspent" with a value of "\$0".
- Award Amount:** A text input field.
- Add Comment:** A button with a comment icon.
- ADD AWARD:** A large blue button at the bottom right.

3. After the Award Amount is entered, additional boxes will appear.
4. Many Athletic funds are restricted to either the academic year or summer. A message will appear for any fund with term restrictions.
5. For all fee-based funds, specified fees (charges) are automatically assessed when determining the amount to be disbursed. For athletic funds, in certain cases, according to NCAA regulations, certain credits must also be taken into consideration as offsets against the charges (e.g. state scholarships, outside aid, etc.). In these cases, the user must check the Full Scholarship box in order for the credits to be considered when determining the amount to be disbursed.

Add Award

Student Id Student Name

Aid Year

Fund

Available to award \$834,696 Unspent \$0

Award Amount

Award Type Full Scholarship

Award Limits Academic Year

Summer Summer not available for this fund

Fall

Spring

Additional fields will appear after the Award Amount is entered

Annualized vs. Non-Annualized Awards

Annualized Awards

Annualized Awards are a new concept being introduced with Institutional Awards. They allow a department to make an award at the start of the cycle, without specifying an exact amount for each term. The funds will be disbursed based on the student's charges for each term, with any unspent amounts for a term 'floating' to the next term. In order to illustrate this concept, several examples appear below.

Annualized Awards - Academic Year checkbox should be checked

Non-annualized Awards - Academic Year checkbox should not be checked

Scenario 1 - Annualized award, disbursed based on charges

Annualized awards may be made by entering the total amount of the award in the **Award Amount** field. The award will automatically be spread over the terms, based on the charges, with any unused portion 'floating' to the next term. The word "auto" will appear in the amount box for each term.

For example, if the department wants to award GD50 for \$30000, the award would be created as follows:

- a. Enter the Award Amount as \$30000
- b. Check the Academic Year box
- c. All terms list 'auto' rather than an amount

Add Award

Student Id

Student Name

Aid Year

Fund

Available to award Unspent

Award Amount

Award Type

Award Limits Academic Year

Summer

Fall

Spring

Scenario 1 timeline:

7/8/18: Student is billed for fall, and is charged 24615 for tuition for fall

8/5/18: Department creates and approves annualized GD50 award for \$30000

8/5/18: GD50 is disbursed for 24615 for fall. 5385 is available for spring.

12/9/18: Student is charged 24615 for tuition for spring.

12/9/18: GD21 is disbursed for 5385 for spring (disbursed for amount of charges, or amount remaining in award, whichever is less), leaving 19430 in tuition charges to be covered by student.

AWARDED: \$30000

SPENT: \$30000

UNSPENT: \$0

If the department wanted to split the \$3000 award equally between fall and spring, then it could either be awarded as an **annualized award with a cap of \$15000 for fall**, with spring listed as “auto” as follows. In this scenario if the charges are less than \$15000 for fall, any amount remaining would float to spring:

Add Award

Student Id Student Name Pe Q

Aid Year

Fund Available to award Unspent

Award Amount

Award Type

Award Limits Academic Year

Summer

Fall

Spring

Alternatively, the award could be made as a **non-annualized award**, with the amounts specified for all terms:

Add Award

Student Id Student Name Pe Q

Aid Year

Fund Available to award Unspent

Award Amount

Award Type

Award Limits Academic Year

Summer

Fall

Spring

In this case the GD50 would disburse for \$15000 for fall and \$15000 for spring, or up to the charges for each term, whichever is less. In this case, if the tuition charges are less than \$15000 for fall, the remaining amount would be lost, and would not float to the spring term.

Scenario 2 - Annualized award, capped amount for one or more terms

Annualized awards may be capped for one or more terms. In this case, the amount disbursed for the term will be the lesser of the amount entered for the term (the cap), or the tuition charges, whichever is less. If the charges are less than the cap, then any unspent amount will 'float' to the next term and be available for that term.

You may cap a term at 0, if you do not want the student to receive any funds in a particular term. You can cap the amount the student should receive in a particular term by entering a specific amount for the term (including 0, if you do not want the student to receive any funds for the term).

In order to cap an amount, simply enter an amount in the term you wish to cap.

For example, if the department wants to award GD21 for \$20000, but make sure it is used only for fall or spring tuition charges, after selecting the student and the fund, the award would be created as follows:

- d. Enter the Award Amount as \$20000
- e. Check the Academic Year box
- f. Enter 0 for summer term, leaving Fall and Spring as "auto"

Add Award

Student Id Student Name

Aid Year

Fund Available to award Unspent

Award Amount

Award Type

Award Limits Academic Year

Summer

Fall

Spring

Scenario 2 timeline:

6/1/18: Department creates and approves annualized GD21 award for \$30000

7/1/18: Student registers for summer, and is charged 4260 for tuition for summer.

7/1/18: No funds are disbursed for summer.

7/8/18: Student is charged 17040 for tuition for fall

7/8/18: GD21 is disbursed for 17040 for fall. 12960 is available for spring

12/9/18: Student is charged 12780 for tuition for spring.

12/9/18: GD21 is disbursed for 12780 for spring (disbursed for amount of charges, or amount remaining in award, whichever is less). \$180 of the award will remain unspent.

AWARDED: \$30000

SPENT: \$29820

UNSPENT: \$180

The department may wish to reduce the Award Amount for this student to \$29820, in order to use the remaining \$180 for another student.

Non-Annualized Awards

The process for creating non-annualized awards is similar to the process in UBUY. You will need to specify the amount for each term, and the amount specified is the maximum the student may receive in that term. The amount of the award that will disbursed for the term will be the lesser of the amount awarded for the term or the charges. For non-annualized awards, the Academic Year box should **not** be checked. The sum of the amounts entered for the terms must equal the Award Amount.

Add Award

Student Id

Student Name

Aid Year

Fund

Available to award Unspent

Award Amount

Award Type

Award Limits Academic Year

Summer

Fall

Spring