



University Scholarships & Financial Aid Services

2011-2012
USFAS Scholarship
Administration Information
Guide

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Introduction

University Scholarships and Financial Aid Services (USFAS) is a system-wide office that exists to provide financial support for students applying to and enrolled at USF. Our focus is on customer service for students, parents and University staff. We provide guidance and support to offices who administer scholarship funds, including set up, awarding, disbursements and reconciliation.

The scholarship deadlines listed below are intended to leverage scholarships for recruiting new students and retaining current students with the added goal of lowering student loan debt. Throughout this information guide, you will be shown how USFAS provides tools and services that can aid you in complying with these deadlines and optimizing the use of USF resources.

2011-2012 Scholarship Deadlines

Student Type	Application Deadline	USFAS Notification Deadline	USFAS Packaging Date
New Freshman	Jan 31	Feb 14	Feb 28
New Transfers & Graduate Students	March 15	March 31	April 15
Continuing Students & Renewals	April 15	May 27	June 17

Cost of Attendance (COA)

The cost of attendance at the University of South Florida is established annually to cover tuition and fees, housing, board, books, supplies, transportation and miscellaneous expenses incurred by students attending USF. Eight categories of students are established for USF's cost of attendance based on six criteria: 1) undergraduate, 2) graduate, 3) Florida resident, 4) non-resident, 5) living on/off campus and 6) living with parents.

For purposes of awarding scholarships and providing USF students financial aid packages, a student's financial need is calculated by subtracting the **estimated family contribution** (EFC) from the **cost of attendance** (COA). If a student receives federal, state, institutional or private gift aid up to the amount of funds needed, the student should be able to attend USF with no debt incurred.

Estimated cost of attendance figures for 2011-2012 can be found at http://usfweb2.usf.edu/finaid/11-12/1112_budget.aspx

Stacking Policy

A package of aid includes all aid awarded to a student (e.g. grants, scholarships, loans, work, waivers, etc).

The USFAS Packaging Policies and Procedures restrict the amount of equity funds (gift aid) to a maximum of 79% of the student's COA (54% for students living at home). The percentage reflects the amount of COA related to direct educational costs (i.e. tuition, books, housing and meals).

- A. If a scholarship is awarded after the student has been packaged with **USFAS administered need based financial aid**, and the student's total gift aid exceeds 79% of the student's COA, USFAS will reduce their awards to stay at the cap. If, after the removal of all the USFAS administered awards, the student still exceeds the 79% cap, they will be allowed to keep the awarded scholarships up to the cost of attendance. In some cases, **a student may not receive any additional aid if they have already reached the 79% cap.**

The priority order for removing University-need based aid is as follows:

1. Federal Supplemental Educational Opportunity Grant
2. Florida Student Assistance Grant
3. USF Grant

- B. If a scholarship is awarded after the student has been packaged, and the package does **not include need-based aid**, the award will be approved up to an amount that meets the student's COA. In some cases, **a student may not receive any additional aid if they have already reached their cost of attendance.**

In the event that aid must be reduced due to the COA, the priority order for removing University-based merit aid is as follows:

1. Funds from the Five Year Plan
2. College of Departmental E&G funds
3. USF Foundation funds

- C. If a scholarship from a source external to USF (private, non-Foundation) is awarded after the student has been packaged, and the student is not receiving any need based aid (grants, work or loans), **the student's cost of attendance may be exceeded by the amount of the private scholarship.**

USF awarding units should create a list of alternate students eligible for scholarship in case the original recipient's award must be revised.

List of Scholarship Services USFAS Provides

The following services are available to assist you in managing your scholarship process:

- Fund code set up for new scholarships
- Scholarship recipient awarding
 - based on payment requests submitted by awarding units or
 - by administering all scholarship responsibilities based on donor specifications and a spending plan provided by the accountable officer for the scholarship
- Set up scholarship terms and conditions, "thank you" letter requirements, and fund comments in OASIS
- Set up awarding/disbursement rules in Banner to automatically enforce donor requirements
- Monitor scholarships based on disbursement rules and renewal criteria stated by the donor
- Provide support and training to awarding units in maintaining the [USF Scholarship Database](#) so that all USF Scholarships are viewable for students
- Provide report access and training (e.g. applicant data for choosing recipients, terms and conditions tracking, fund reconciliation) for general scholarship information through [USFAS Scholarship Administrative Reports](#)

Role of College/Department

The college/department is responsible for contacting University Scholarships and Financial Aid Services (USFAS) when establishing new scholarships/grants or updating any existing scholarships/grants.

Establishing a New Scholarship or Research Grant

To ensure compliance with all federal and state regulations, all scholarship awards must be disbursed through the student's University account. Therefore, scholarship or grant funds will not disburse directly to students or to a 3rd party on behalf of a student.

Step 1: Determination of Scholarship/Grant Management

The college/department determines if the scholarship or grant will be awarded by USFAS. If USFAS has been chosen to administer your fund(s), we will:

- Require a spending plan for each scholarship after a fund code has been created (See Step 2 about establishing new funds);
- Ensure timely awarding in accordance with the scholarship requirements;
- Ensure timely payments each term in accordance with the criteria specific at the time the fund was created; and
- Reconcile awards and payments by term to ensure full utilization.

Payments to individuals may be processed via USFAS, Purchasing/Accounts Payable, Travel, or Payroll. Processing will depend on the nature of the payment and the relationship between USF and the recipient. Additional information regarding specific payment categories is provided via the link below. Please refer to the following site for additional information: [Compass Online Business Procedures](#)

Step 2: Setting Up a New Financial Aid Fund Code

The USFAS "[New Fund Code Form](#)" is needed to disburse *any* scholarship/grant to students through OASIS/Banner Student Production (PROD).

In order to complete the "New Fund Code Form," be sure to do the following:

- 1) Identify Accountable Officer
- 2) Establish the name of the award
- 3) Identify/establish FAST accounting entries and Chart Fields (non-USF Foundation scholarships/grants only).

- 4) Identify awarding and disbursement rules, if any, per the donor agreement. (Disbursement rules can be created for anything that can be monitored in Banner. This includes major, department, class code, GPA, etc.)

As indicated on the form, USF Foundation scholarships/grants need to be sent to a USF Foundation administrator to be signed. Then, USF Foundation sends the form to USFAS. For non-USF Foundation programs, the form is sent directly to USFAS.

Once the "New/Update Fund Code Form" is turned in to USFAS, we will coordinate with the University Controller's Office in creating a Financial Aid Fund Code. This process typically takes 5 business days. Once the Financial Aid Fund Code has been created, the college/department will be notified via email that payments may be requested (See USFAS Payment Process). Please contact Monique Prosper (mprospe2@usf.edu) with any payment questions.

Step 3: Advertising Scholarships in the "[USF Scholarship Database](#)"

University Scholarships and Financial Aid Services (USFAS) manages the scholarship database, which is used as a resource by students to find USF scholarships efficiently, based on specific eligibility criteria. The "[USF Staff Portal](#)" link provides a "[Scholarship Database Create/Update Form](#)" where designated staff can post scholarships to be advertised through the database

- If you are adding a new scholarship to the database, click "Add a New Scholarship" and fill out the form in its entirety.
- If you are updating a scholarship that has already been submitted to the database (active or inactive), simply find your awarding unit in the drop down box, find the appropriate "status" in the drop down menu, and click "Search for Scholarships." You can edit, inactivate or activate an existing scholarship.

Additionally, USF Scholarship Database advertising may be tailored to your application and awarding cycle within USFAS guidelines. You may advertise application deadlines and inactivate a fund once those deadlines have passed.

Please contact Monique Prosper (mprospe2@usf.edu) with any questions regarding the "USF Scholarship Database." Monique offers database training on a one-on-one basis to ensure proper use. (**Please note:** The scholarship application deadline must comply with the established scholarship notification deadlines outlined on page 3).

Step 4: Setting Up Scholarship Terms & Conditions and Fund Messages

USFAS has developed a way for scholarship terms and conditions to be displayed and tracked. Scholarship terms and conditions are electronically displayed and accepted on students' OASIS accounts. Since they are posted as a requirement on OASIS, they prevent scholarships from disbursing until accepted.

Please note: Scholarship terms and conditions are for scholarships that are *annually* renewable.

For non-renewable scholarships, posting fund messages in OASIS is an option that allows students to read any requirements/disbursement rules, such as minimum enrollment, by clicking on their scholarships. This is a popular option for unique funds that disburse before requirement(s) can be satisfied, such as attending a donor luncheon.

In order to set up any of these services, email mprospe2@usf.edu copies of your terms and conditions/fund messages and a list of fund codes that apply to each.

Step 5: Setting Up Requirements for "Thank You" Letters to the Donor

Many scholarships require that a "Thank You" letter be sent to the donor before disbursement. Similar to terms and conditions, our office can ensure that these letters have been submitted before any scholarship money is paid. Additionally, it is posted as a requirement in OASIS.

Students will be directed to send their "Thank You" letter(s) to USFAS so that we can satisfy the requirement on OASIS and scan the letter into our scanning database, Liberty. The original is then sent to the appropriate awarding unit.

Managing Existing Scholarships/Grants

The USFAS "[Update Fund Code Form](#)" is used for updating existing scholarships/grants. This form allows you to edit/update any information about a fund, such as:

1. The name
2. Source or account
3. Fund code
4. Awarding and disbursement rules, if any, per the donor agreement. (Disbursement rules can be created for anything that can be monitored manually. This includes college, major, department, class code, GPA, etc.)

Additionally, USF Scholarship Database advertising may be tailored to your application and awarding cycle within USFAS guidelines. You may advertise application deadlines and inactivate a fund once those deadlines have passed.

If you would like to add or edit any scholarship disbursement rules or add any services to an existing scholarship/grant, please email mprospe2@usf.edu.

As indicated on the "Update Fund Code Form," USF Foundation scholarships/grants need to be sent over to a USF Foundation administrator to be signed. Then, USF Foundation sends the form to USFAS. For non-USF Foundation programs, the form is sent directly to USFAS.

USFAS Payment Process

If your college/department has decided to award your fund(s), please follow the instructions below:

- 1) Select students to receive funds. We recommend using the USFAS Reports to efficiently choose recipients (See "Requesting Access to the USFAS Administrative Reports"). Please note that eligible students must be actively enrolled at the time of disbursement.
- 2) Complete the scholarship "Payment Request Form" and scan and email as an attachment to AA USF ASPFR (usfaspfr@usf.edu). Awards are normally posted within 10 business days of receipt of the completed form. These requests should be turned into USFAS no later than the corresponding Scholarship Notification Deadline found on page 3.
- 3) Colleges/Departments should monitor awards and payments from the Fund Reconciliation Report in the USFAS Administrative Reports (See "Requesting Access to the USF Administrative Reports.")

Please email Monique Prosper (mprospe2@usf.edu), with any payment questions.

Cancellation/Reduction Requests

The "[Scholarship Cancellation/Reduction Form](#)" is available for units who would like to cancel and/or make adjustments or corrections to any fund that has been awarded or paid. This option is available for prior terms.

The awarding unit is responsible for notifying the student of these types of changes.

Examples of prior use of the Cancellation/Reduction Request Forms:

- Student does not complete terms/conditions such as attending a donor required luncheon, presentation, etc.
- Student was paid in error and did not meet the original donor requirements.
- Student was paid from Fund 'A' and should have been paid from Fund 'B.'*

*NOTE: If an awarding unit is using the Cancellation/Reduction form to move funds from one fund to another, a "Payment Request Form" is required in order to pay the student(s) from the correct fund. The two forms should be submitted at the same time. Incorrect submissions may result in a student being paid twice or being billed with no award to replace it. This type of issue should be brought to the attention of the Scholarship Awarding Team Manager to ensure they are processed correctly.

Requesting Banner Access

In order to run any USFAS Administrative Reports discussed in the next section, you must have OASIS/Banner access. Go to <http://www.ods.usf.edu/SIS/> then click on OASIS for Staff -> Request Access. You must pass the FERPA quiz in order to print out the request form and submit it to a Primary Process Owner. This form must be signed by the user and an accountable officer for the user's hiring unit.

Requesting Access to the [USFAS Administrative Reports](#)

The USFAS Administrative Reports include:

REPORT 6 New Student General Scholarship Information via Population Selection

This report is useful in choosing scholarship recipients. It allows you to compare multiple applicants' information, such as USF GPA, major and test scores from Banner, for newly admitted students. (Please note: All USF scholarship applications must indicate that recipient information may be shared in order to obtain information from this report).

REPORT 7 Fund Code Reconciliation by Term

This tool allows you to monitor payments (by term) by viewing the recipient, offer amount, paid amount, and paid date, as well as the overall total offered and paid amounts by fund code.

REPORT 8 Scholarship Terms & Conditions/Thank You Letters

Search to see which recipients have completed their terms and conditions and/or "Thank You" letter requirement(s) by searching by fund code.

REPORT 9 Fund Code Reconciliation by Fiscal Year (FY)

This report is the same as REPORT 7, except it allows you to monitor payments by fiscal year.

REPORT 16 Fund Code Monitor Report

This report allows you to search for your scholarship to ensure that USFAS has the most accurate information on file.

REPORT 17 Fund Code Status by Aid Year

This report provides the current set up for your scholarships in Banner Student Production based on the "New/Update Fund Code Form."

REPORT 20 Continuing Student General Information via Population Selection

This report is useful in choosing scholarship recipients. It allows you to compare multiple applicants' information, such as USF GPA, major and test scores from Banner, for continuing students. (Please note: All USF scholarship applications must indicate that recipient information may be shared in order to obtain information from this report).

Note: All reports can be exported to Excel.

Please email Monique Prosper (mprospe2@usf.edu) with your Banner ID and awarding unit to gain access to these, and other, administrative reports. Additionally, if you need information that is in Banner, but not on the reports, contact Monique.

Confidentiality

According to the Family Education Rights and Privacy Act (FERPA), schools may disclose, without consent, "directory" information such as a student's name, address, telephone number, date and place of birth, honors and awards, and dates of attendance. Additional information, such as GPA, earned hours, scholarships, etc, cannot be disclosed unless the student agrees and signs to allow third parties to view their information, such as the donor. A student release may be authorized via a scholarship application or Terms and Conditions.

Visit <http://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html> for more information about FERPA.

The Roles of USFAS Scholarship Awarding and Processing Teams

The Scholarship Awarding Team Responsibilities:

- Banner Student Production (PROD) set-up for:
 - University-Wide scholarships
 - Fund code set-up
 - Payment information and processing
 - Disbursement rules
 - Scholarship Terms and Conditions
 - "Thank You" letters
- The USFAS Administrative Reports
- The USF Scholarship Database

The Scholarship Processing Team Responsibilities:

- Banner Student Production (PROD) set-up for:
 - Research grants
 - Federal and state scholarships
 - Athletics

USFAS Contacts

The Scholarship Awarding Team

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The Scholarship Processing Team

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