Office of Student Scholarships
Scholarship and Fellowship Awards Procedural Manual
2009-2010

IUPUI Office of Student Scholarships
IUPUI Scholarship Clearinghouse
425 University Blvd. CA 103
Indianapolis, IN
Awards@iupui.edu
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Office of Student Scholarships (OSS)

**Scholarship Clearinghouse:** For Posting inquires, E-award entry assistance, item type information and requests, posting requests, etc.

Erin Glueckert, Student Awards Specialist  egluecke@iupui.edu  278-5508  
Beth Barnette,  Director  blbarnet@iupui.edu  274-5917  

Office of the Bursar

Information on processing a fee remission, an award processed through the Office of the Bursar to pay directly towards the student’s tuition:

- Fee remission website: [http://mpc.adfi.iupui.edu/SchoolsPage.htm](http://mpc.adfi.iupui.edu/SchoolsPage.htm)  
- ADFI Administrative Services Team-  adsv@iupui.edu  (for access to website)  
- Fee remission questions: Can click to follow link for fee remissions website, or bursar@iupui.edu  
- General Bursar inquires- 274-2451  

Financial Aid Office  
- Main Contact number:  274-4162  

FMS Taxpayer Office: For all student tax related concerns

- Email: taxpayer@exchange.ucs.indiana.edu  
- Telephone: (812) 855-5657  

- Financial Management Support  
  400 East Seventh Street  
  Bloomington, IN 47405
Guide to Policy and Procedure Manual for the Office of Student Scholarships

Introduction

This is a guide to policy and procedure for all departments on the IUPUI and IUPUC campuses according to the Office of Student Scholarships regulations and guidelines. Currently, the Office of Student Scholarships has policies in place to help expedite departmental requests as quickly as possible, but the documents and instructions needed to apply awards to student accounts has been difficult to access without direct contact with the Office of Student Scholarships. It is the goal of the Office of Student Scholarships to provide this manual as documentation to help all offices on campus to have fast access to the Office of Student Scholarships forms and instructions.

Who receives this guide?

All university personnel, including individuals in both academic and administrative offices, that are accountable for the awarding of scholarships, fellowships, transferring monies and balancing general ledger accounts in reference to student awards, support staff within departments responsible for administrating award applications and individuals that need to understand the “rules” by which the Office of Student Scholarships must abide.

What materials am I required to use?

Not all university employees will need to use the same forms or instructions to process requests with the Office of Student Scholarships. The manual is divided into specific areas of awarding to better help all departments on campus. Mainly, this guide is intended to be an informational tool.

All required documentation and forms for various requests are provided. These documents include fellowship award forms, departmental award forms, and item type requests. Departments are encouraged to be conscious of the anticipated posting time in order to prevent any issues that might delay the release of funds to a student. **With this, we request posting requests at least 2 weeks prior to intended post date, otherwise exact post dates can not be guaranteed.** It is our goal to provide a useful resource to assist in all parties involved in the application, distribution and completion of all scholarships and awards.

Thank you,

Staff of the Scholarship Clearinghouse
Departmental Scholarship Awarding

Information and instructions regarding the processing of departmental awards:

- Awards are to be posted by the department awarding through the E-Award Departmental entry system. (Scholarship and Departmental Entry Manual follows.)

- Access to the E-Award Departmental entry system must be granted after receiving training, awards will need to be submitted to the Office of Student Scholarships for processing until access is fully granted. Please contact Erin Glueckert 278-5508 or awards@iupui.edu.

- ***This awarding system is only for scholarship entry only, fellowships are processed as before with by completing the fellowship award form.***

- Awards must be made in whole dollars. This can delay processing if entered with cents.

- Awards for students not enrolled* should either be paid via check request (if they are being paid from an IU foundation account) directly to the student, or by a disbursement voucher through the general ledger account by the requesting unit. **** Please be aware that awards distributed to students who are not enrolled will be considered taxable income by the IRS.

- The office of Student Scholarships can be notified of any awards made to the students to follow up for processing, but can not generate checks for students.

- When an award is posted into SIS through the Departmental Entry screens the system will automatically review the student’s financial aid information and if a student has financial aid (federal or state) the students account will be automatically reviewed by the Office of Student Financial Aid Services to ensure the student over awarded and does not receive excess refund.

- Each department is responsible for developing an internal system for processing and auditing the awarding process.

- It is recommended that the departmental representative responsible for award notification and processing be different from the departmental representative responsible for departmental account reconciliation.

- Departments can request that the Office of Student Scholarships run a list of departmental scholarship awards to confirm the names of students and amounts of those awards for departmental account reconciliation.
It is suggested that you continue to complete the departmental award form as before and circulate within your department prior to posting through the Entry system.

Since the Office of Student Financial aid Services and the Office of Student Scholarships do not know the individual departmental processes for determining the recipients of the various scholarships, the responsibility resides within the departments to audit themselves to ensure that the funds are distributed according to the terms of the scholarships.

It is suggested that information sent out to notify the student be changed to reflect the department posting. The Office of Student Scholarships continue to access student account information for review, however for posting inquires from the student will direct to the department.

Awards posted through the Departmental Entry are reviewed by the Financial Aid offices before being posted to a student’s account. These are reviewed daily, however may take up to 48 hours during peak processing times.

Departments are now required to set up their own departmental account for posting awards. This account will need item types created to award from. Request form in manual.) OSS is no longer allowing transfers into our accounts (25-891-23) for departments to award from with this new process.

If there are ever any questions regarding the E-Award Departmental entry system or the processing of a departmental award contact:

Erin Glueckert, Scholarships Award Specialist
IUPUI Office of Student Scholarships, CA 103
awards@iupui.edu  Telephone: 278-5508
IUPUI AWARDS TIMELINE AND RATIONALE

To offer the best possible student service, please note the following timelines.

**** Fall Scholarship Awards****

May 1st (Incoming Freshman): Departmental awards should be entered into the E-Award system no later than May 1st to ensure that scholarship awards will appear on the Incoming Freshman’s Financial Aid Award Notifications. This will better serve both the student and IUPUI as this will provide a more accurate account of the students’ Financial Aid for the academic year and will serve to increase the probability of the students’ matriculation.

June 1st (Continuing Students): Departmental awards should be entered into the E-Award departmental entry system no later than June 1st to ensure that scholarship awards will appear on the Continuing Students’ Financial Aid Award Notifications. This will better serve both the student and IUPUI as this will provide a more accurate account of the students’ Financial Aid for the academic year and will serve to increase the probability of the students’ retention.

July 1st: The final priority due date that scholarship awards should be entered into the E-Award departmental entry system is July 1st as award notifications submitted by this date will appear on the students’ Fall Bursar Bill.

Mid-July: Anticipated Fall Bursar Bills are determined and released. Early-Mid August: The anticipated due date of the fall Bursar Bills

Although it is not always possible, it is best for the student to determine awards prior to bills being released. For Financial aid packaging purposes, it is also best to try to award for the entire year at the beginning, rather than fall now and spring later. It is often easier and less confusing for the student to be packaged with academic year awards in the fall, then offering a spring only award which may require an account adjustment in the spring to ensure there is no over award.

**** Spring Scholarship Awards****

November 15th: Departmental spring awards should be entered into the E-award Departmental Entry System no later than November 15th to ensure that the scholarship awards will appear on the students’ Bursar bill. This will better serve the student by eliminating any confusion on the Bursar balance date and the personal deferment option. Please note awards entered after this date may not appear on the student’s Bursar account.

December 1st: The final priority due date that scholarship awards should be entered into the E-Award departmental entry system is December 1st as award notifications submitted by this date will appear on the students’ Spring Bursar Bill.

Mid-December: The anticipated due date for the Spring Bursar bills
Scholarship and Departmental Entry

Adding Awards in SIS

IUPUI Enrollment Services

Presented 4/2008
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Procedures for FA Approval Not Needed
(no federal aid or federal aid not disbursed)

• Please note the following:
  • On the Scholarship Entry-Dept page, the student’s Career field will already be populated. Please do not adjust that field.

1. Navigate to the Departmental award screen. Choose the Award Period you wish to award and the Student Status box will populate. If the student is not aid year activated, adding the award will automatically populate this information. (See Below)

   In the Student Status box you will see the following information:
   o Aid Year Activated
   o Whether the student has Federal Aid (keep in mind this will show “No” aid if it has not disbursed)
   o Activate and non active terms

   *Please note that if you attempt to put on award for a non active term this may delay the crediting of the award.

   For the above example you can see that this particular student was not term activated for the fall therefore it is highlighted in red.

   • Processing Status will show as “Loaded” and the Award Status will show as “Approved”. If the terms cannot be built, the Processing Status will show as “No FA Term” and the Award Status will show as “Waiting”. This can happen if the student is not enrolled.

2. Enter the scholarship in the Award Entry section along with the correct disbursement plan and split code.
• **Action Code:**
  B = The award has been offered and accepted on behalf of the student and will automatically disburse.
  O = The award has *only* been offered and the student will need to accept the award by contacting the OSS. The award will not disburse until it has been accepted.
  C = The award needs to be cancelled or removed from the account.

• **Item Type:**
  Please enter the item type that corresponds with the general ledger account that you wish to award. You must have the item type to post the award. (Item type instructions on page 9).

• **Award Amount:**
  Please enter the award amount in whole dollars only. Do not use cents.

• **Disbursement Plan:**
  The disbursement plan or code is how the award should be disbursed, i.e. fall, spring, or the academic year. We want to encourage the use of the academic year codes because it encourages enrollment for the spring semester, we can use to entice retention, and the student can see the amount of funding they will receive and can count on it. We understand there are times when this is not possible but please try to use the AY/AY codes as often as possible.

<table>
<thead>
<tr>
<th>Term</th>
<th>Academic Year</th>
<th>Fall Only</th>
<th>Spring Only</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Definition</td>
<td>Award is for both fall and spring</td>
<td>Award is for fall only</td>
<td>Award is for spring only</td>
<td>Award is for summer</td>
</tr>
<tr>
<td>Code</td>
<td>AY/AY</td>
<td>AY/AF</td>
<td>AY/AS</td>
<td>SU/SU</td>
</tr>
</tbody>
</table>

3. You have the option of entering a primary and secondary email address in the **Email Notification** box, if you wish to receive an email once the entered scholarship has been processed. An email notification is optional. **Please Note:** This is not the student’s email.

4. Click the yellow **Validate/Post Awards** button.
Procedures for FA Approval Needed
(scholarship entered after federal aid disbursed)

1. Navigate to the Departmental award screen. On the Scholarship Entry-Dept page, the student’s Career field will already be populated. Choose the Award Period you wish to award and the Student Status box will populate. See Below:

   • In the Student Status box you will see the following information:
     - Aid Year Activated
     - Whether the student has Federal Aid (keep in mind this will show “No” aid if it has not disbursed)
     - Activate and non active terms

   For the above example you can see that this particular student was term activated for the fall and spring therefore it is not highlighted in red. This means the terms have been built. If the term(s) can be built they will automatically build for both fall and spring if possible once the award period is entered.

2. Enter the scholarship in the Award Entry section along with the correct disbursement plan and split code.

   • Processing Status will show as “Loaded” and the Award Status will show as “Approved”. If the terms cannot be built, the Processing Status will show as “No FA Term” and the Award Status will show as “Waiting”. This can happen if the student is not enrolled.
• **Action Code:**
  B = The award has been offered and accepted on behalf of the student and will automatically disburse.
  O = The award has *only* been offered and the student will need to accept the award by contacting the OSS. The award will not disburse until it has been accepted.

• **Item Type:**
  Please enter the item type that corresponds with the general ledger account that you wish to award. You must have the item type to post the award. (Item type instructions on page 9).

• **Award Amount:**
  Please enter the award amount in whole dollars only. Do not use cents.

• **Disbursement Plan:**
  The disbursement plan or code is how the award should be disbursed, i.e. fall, spring, or the academic year. We want to encourage the use of the academic year codes because it encourages enrollment for the spring semester, we can use to entice retention, and the student can see the amount of funding they will receive and can count on it. We understand there are times when this is not possible but please try to use the AY/AY codes as often as possible.

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<td>Code</td>
<td></td>
<td>AY/AY</td>
<td>AY/AF</td>
<td>AY/AS</td>
</tr>
</tbody>
</table>

3. You have the option of entering a primary and secondary email address in the Email Notification box, if you wish to receive an email once the entered scholarship has been processed. An email notification is optional. **Please Note:** This is not the student’s email.

4. Click the yellow **Validate/Post Awards** button.

5. The award will be reviewed and approved within 24 hours.
Adding/Adjusting/Cancelling Scholarships

To add another scholarship or to adjust a scholarship that has already been entered, click the yellow “plus” sign in the Award Entry box to create a new row. Note: If you have not validated/posted the award, you can make changes at any time to the amounts or disbursement plans.

- You will always need to enter the Academic Period. This will populate the award that has already been entered for that period.
- If you are adding, adjusting, or cancelling an award that you have already validated/posted, you will need to click the “plus” sign to create a new row.

Example 1 Adding: A student has already been awarded a fall only scholarship for $1000 and is now eligible for the remaining $1000 for spring. You cannot simply increase the original amount. You would need to add a new row and add the award for the total the student is suppose to receive which is $2000 with a split code of AY/AY. Should you add a spring only scholarship for $1000, it would override the fall amount and the student would then owe those funds back from the fall. Click the Validate/Post button. The new row will take the place of the original award. The spring disbursement will now show as an award on the account.

Example 2 Adjusting: A student is awarded a $2000 academic year scholarship and now will not be attending the spring semester. You would need to add a new row and add the award for the total the student is suppose to receive which is $1000 with a split code of AY/AF. Click the Validate/Post button. The new row will take the place of the original award. The spring disbursement will not longer exist but the fall disbursement will remain on the account.

Example 3 Cancelling: A student was awarded a $1000 scholarship under the wrong item type and you have Validated/Posted the award. You would need to add a new row, enter a “C” (cancel) in the action code, enter the same item type which was originally awarded; the dollar amount will need to be $0 with the same split code you originally posted. This will cancel out the original post. You can then add a new row and start fresh with the correct item type and amounts.

Please Note: We do not use the contact information or online site for Bloomington listed at the top of this screen. In the event you need assistance if you have questions about adding or adjusting an award or should you need to report a scholarship directly, please email Erin Glueckert at egluecke@iupui.edu.

Requesting a New Item Type
Office of Student Scholarships
Departmental Award Entry (E-Award) Quick Reference Guide

1. Make sure you entered the correct student ID number. Check by matching the student’s name that comes up.
2. Make sure the aid year is correct. The aid year is 2009 for the Spring 2009 and summer 2009 term awards. The aid is year is 2010 for all Fall 2009, Spring 2010, and Summer 2010 awards.
3. **Make sure the item type is correct.** There are different item types for summer and the academic year. Now, item types are also being distinguished for a different item type to be used for undergraduate awards vs. graduate awards. ****** Anytime you need new item types created feel free to submit a request to awards@iupui.edu.

4. **Make sure you are selecting the correct Award Period.** If you are awarding an academic year award (or fall or spring only) you need to select the ACADEMIC YEAR award period. The Non-Standard award period is to be used only for summer term awarding. In that case you would then use the summer item type also. Entering an award using the wrong award period/item type will cause it to be WITHHELD from passing to the student’s account to disburse.

5. **Be aware of red flagged FA notices.** If you see red flags on the students account when entering, it means there may be something that will hold up the processing of your award. If the FA terms are highlighted in red, this means the term is NOT ACTIVE to award. If you continue to award a scholarship for that term it will be WITHHELD, and will not pass through to the student’s account to disburse. In most cases an FA term is not active because a student is not registered for that term. If you are planning to enter an academic year award to be split half between the fall and spring and you see that one of the FA terms is not active and proceed with posting the entire award, it will disburse the entire amount into one active FA Term.

6. **Be aware of the red flag for FA office approval/student receiving other financial aid.** If you are entering the award before August 16, 2009 the award will pass through immediately to the students account. AFTER this date, IF the student has a red flag for receiving other financial aid this means that FA needs to review the account and possibly make adjustments to other awards before allowing your award to pass. This also creates additional time before the award will pass to the student’s account.

7. **DO NOT try to enter an award if you have entered for the fall only (AY/AF) and are using the same item type for the spring.** If entered an award for the fall only and you now want to award for the spring FROM THE SAME ITEM TYPE, you will need to submit those requests to awards@iupui.edu and I will post the spring portion. It came to our attention that if you try to enter that spring award on the same item type it will over ride and cancel the fall portion previously entered.

8. **Make sure you are using correct disbursement plans and split codes.** The only available split codes and disbursement plans are listed below. If you use SO or FO, the award WILL NOT pass through to the students account:

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<th>Academic Year</th>
<th>Fall Only</th>
<th>Spring Only</th>
<th>Summer</th>
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</thead>
<tbody>
<tr>
<td>Definition</td>
<td>Awards both fall and spring</td>
<td>Awards fall only</td>
<td>Awards Spring only</td>
<td>Awards summer</td>
</tr>
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| Code         | AY/AY          | AY/AF       | AY/AS        | SU/SU           |

9. Any questions, feel free to always ask. You can contact me directly with questions.
   Erin Glueckert
   Office of Student Scholarships
   Cavanaugh Hall 103
   Phone: 278-5508
   Fax: 278-3292
   Egluecke@iupui.edu

IUPUI Office of Student Scholarships

DEPARTMENTAL SCHOLARSHIP AWARD FORM
TO BE COMPLETED AND SUBMITTED TO awards@iupui.edu or faxed to 278-3292
For questions please contact the above

Department/School: _______  Phone: ________  Date: ______

Authorized Acct. Manager: _______

Scholarship or Award Name: _______

| Awarding from your GL account? |
| (the account number has an item type) |
| Departmental Account: _______

<p>| AWARDED TO: | REQUIREMENT |</p>
<table>
<thead>
<tr>
<th>FULL NAME</th>
<th>UNIVERSITY ID</th>
<th>AMOUNT (whole dollars only)</th>
<th>FALL, SPRING, AY, or multiple disbursements (please list)</th>
<th>Min credit hrs.</th>
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Fellowship Award form Instructions

Please read the following instructions before completing the Fellowship Award Form:

- This form may be completed within Microsoft Word and e-mailed to awards@iupui.edu. Or if you prefer, mail the completed form to CA 103 A, Attn: Erin Glueckert or fax to 278-3292.
- In compliance with University policy, financial transactions must be approved by the fiscal officer or fiscal officer delegate, therefore please have this form completed and routed to the fiscal officer or delegate for approval and submission.
- Effective July 1, 2009 please complete the new fellowship award posting request form for posting with the Academic year method. Beginning on this date, fellowship awards will no longer be posted in multiple disbursement dates. The awards will be posted in an Academic year method, disbursing half of the award at the beginning of the fall term and half of the award at the beginning of the spring term.
- The first summer term on the new awarding method will be summer 2010 (term 4105). A student will be required to enroll in at least 1 credit hour for summer to have their fellowship award disbursed via the student account. If a person is not registered for summer, the disbursement of monies is facilitated by using an FIS disbursement voucher.
- To protect a person’s identity, the University does not use SSN. Please request that your students provide their university ID – a ten digit number beginning with a series of zeroes. They are able to view this number as part of their personal information in OneStart and in the upper right corner of many of the screens. If you have the university ID, just provide the last 4 digits of the SSN on the award form.
- Once we receive the form, it will be processed within 48 hours of receipt or during a peak work load in the order that it is received. Once entered into the financial aid system, the credit will show on the student’s account the next day. Any remaining fellowship funds after paying outstanding charges will be refunded. Student account refunds are processed daily for those with active direct deposit information on file; non-direct deposit refunds (paper checks) are processed on Tuesdays and Thursdays. Monies refunded via direct deposit are typically available at the student’s bank two (2) to four (4)) business days after the credit is put on the student account. (Saturday and Sunday are not considered “business days”.) Monies refunded via paper check, the check is typically mailed two (2) to four (4) business days later.
- The Financial Aid system utilizes item types – which are 10 digit numbers that are linked to your specific general ledger account number. These item types are the only means of posting fellowships through the financial aid system. All account numbers that pay fellowships will have to have an item type created or modified. This includes continuation accounts, and new accounts. Please notify us immediately if you will be utilizing a different account number or changing an account number so that we can verify that an item type exists or have one created. Currently it is taking approximately 2–4 weeks to have an item type created.
- You do not have to complete a new award form for terminations. Termination notifications can be sent to awards@iupui.edu. Include the original award, amount received, balance to be cancelled, and effective date of termination. We will use this as our official notification and will modify the award and attach the document to the original award form in our files.
- Please encourage your students to review their accounts on OneStart. They are able to view all activity on their accounts including payments, refund status, etc.

For additional information or questions, please contact:

Erin Glueckert, Office of Student Scholarships
**Student Information**

<table>
<thead>
<tr>
<th>Name</th>
<th>Last</th>
<th>First</th>
<th>Initial</th>
<th>Student’s Email Address</th>
<th>University ID</th>
</tr>
</thead>
</table>

**School/Department Information**

<table>
<thead>
<tr>
<th>School</th>
<th>Department</th>
</tr>
</thead>
</table>

Contact information regarding this form:

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone number</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Campus Address</th>
<th>E-mail</th>
</tr>
</thead>
</table>

**Fiscal Officer Approval:**

**Award Information**

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Termination Date</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Account Name</th>
<th>GL Account Number</th>
</tr>
</thead>
</table>

Total Amount of Award: $__________  *Whole dollar amounts only*

**Fellowship Awarding Schedule**

(The total award amount will be split to disburse half for the fall and half for the spring. If you want to award a portion of the fellowship amount for the summer term, the student will need to be enrolled during the summer to receive a disbursement.

Please list amounts accordingly and refer to instructions above.)

Fall $__________  Spring $__________  Summer $__________

**Comments/other instructions**
Fellowship Award FAQ’s

• What is a fellowship?
  o The IRS definition of a fellowship is as follows: an amount paid for the benefit of an individual to aid in the pursuit of study or research.

• I have fee remission and it is not posted, who do I contact?
  o Please contact your specific department to inquire about fee remission; the scholarship office does not process this.

• Who notifies the scholarship office of my fellowship award?
  o Your department will notify the scholarship office of your fellowship award. We are unable to post any awards until we receive the documentation.

• When will my fellowship award be on my financial aid account?
  o Once the department notifies us of the award, we will process the request within 48 hours of receipt or during peak work load in the order that it is received.

• Why do my fellowship payments show up as anticipated aid?
  o Stipends paid on a monthly basis will show future payments under anticipated aid to reflect in your financial aid account and bursar account of aid that will process on a specified date.

• When will my fellowship award refund to me?
  o Monthly stipend payments are released from the financial aid system over to the Bursar system at least three (3) days prior to the end of the month for payment by the first of each month. For example – an August 1st payment would be released to the Bursar system on July 25th so that the funds can then be processed for refund and received by the student by the 5th of each month.

• Why are taxes not taken out of my fellowship stipends?
  o Fellowship awards are a form of financial aid that is required to be calculated into the financial aid package for each student. Fellowship stipends are not paychecks and therefore federal or state taxes are not withheld. All students who receive scholarships and/or fellowships receive an IRS form 1098-T from the university (January/February). This form is to be taken to your tax preparer in order to determine what (if any) portion of your award is taxable.
  o For additional information regarding fellowship or scholarship awards, please review IRS Publication 920 at http://www.irs.gov/pub/irs-pdf/p970.pdf.

• I have been taxed on my fellowship, who do I contact for information?
  o Please contact the FMS Taxpayers office for all tax concerns, the e-mail address is: taxpayer@exchange.uics.indiana.edu.

• Why is my refund less than my fellowship stipend amount?
  o All funds processed through the Bursar system will pay ANY and ALL outstanding fees on your account before issuing a refund. Please check to make sure your fee remission has paid your tuition/fees in full and that you do not have any other fines, fees, etc.

• How long does the refund process take?
  o Refund cycles are ran daily, therefore once the financial aid account has released the stipend payment to the Bursar system, the refund should process within 2 days. Please allow an additional 2-4 days for direct deposit and 3-5 days for a paper check.

• How do I sign up for direct deposit?
  o Signing up for direct deposit is easy and online! Please visit your OneStart account and utilize the Self Service tab. On the left panel under the Bursar tab there is a link to sign up for direct deposit. Please note that this will expedite the processing of your refund.

• Where can I view my account information?
  o All of your account information may be accessed and/or viewed by utilizing OneStart! Visit www.onestart.iu.edu.
Please direct inquiries regarding fellowship awards to awards@iupui.edu

IUPUI Office of Student Scholarships
Item Type Request Form

Please complete the following form if you have a new GL account number that is requiring an item type to be established or additional item types to be created on a current account. Forms must be submitted to awards@iupui.edu or mailed to CA 103 Attention: Erin Glueckert.

Financial Aid Item Types are created within SIS to award financial aid or to serve as a place holder for some awards. This is required to post an award to pull from your GL account. FA item types have many components which must be set to define parameters for financial aid item types.

The following information is needed in order to have a financial aid item type created which links to your specific GL account. If this is a continuation account (replacement for an expired account), you do not need to complete this information, but let us know and we will modify the item type with the current account number.

1. An award needs to be added to a student’s account but the item type has not been created.
2. Submit the information as soon as possible so that the process can begin promptly.
3. A request form is submitted directly to the Office of Student Scholarships by emailing awards@iupui.edu or mailing the form to CA 103 Attention Erin Glueckert.
4. Requests for new item types are set by the SES CTM team.
5. A spreadsheet is constructed and submitted to the SES CTM team.
6. Creation of the item type may take between 4 – 6 weeks.
7. At the time the item type is created, the individual making the original request will be notified that the award can be added.
8. These requests are made as needed.

*****Please note:***** Any award to be posted on a student’s account with the referenced account number cannot be processed without the item type so please **plan ahead**. If you have an existing or alternate account number that has an item type associated with it (one that a student is currently being paid from) that you would like to use and just transfer the funds, and the award can be processed immediately. Additionally, please notify your student(s) of this delay.

Office of Student Scholarships
425 University Boulevard
Cavanaugh Hall, Room 103
Indianapolis, IN 46202
Item Type Name

(Please provide a name that is easily read and recognized by the student. This is the description that the student will see on their Bursar account.)

GL Account Number

What is the source of the funding?

☐ State (S)   ☐ Federal (F)   ☐ IU General Funds (G)

☐ IU Endowment (E)   ☐ Private External (P)   ☐ Other IU Institutional (O)

☐ IU Foundation Endowment/Pooled Income (I)

Who selects the recipient?

☐ Financial Aid Office  ☐ Department  ☐ External

What is the award based on?

☐ Need  ☐ Merit  ☐ Both  ☐ Neither

What is the type of the award?

☐ Scholarship  ☐ Fellowship

Who is receiving an award on this item type?  Is this for a student in a MED program?

☐ Undergraduate  ☐ Graduate  ☐ Both  ☐ Yes  ☐ No

What term(s) does this account need item types created for?

☐ Summer  ☐ Academic year
How to access item types within IUIE

You can use IUIE to check to see if item types have been created for your account, however access must be granted to access these reports.

The link is on the SIS Admin page in OneStart:

- Click Access the IUIE
- Catalog
- My Catalog
- New Shortcuts
- Item Types

Once you are in the report:

- Key in IUINA in the institution field
- Key in the aid year (2009)
- Key in GL Account number
- Scroll all the way down and hit send

If an item type exists for that account number it will appear in a new window.

If not, one will have be requested – the department must complete the OSS Item Type Request form to awards@iupui.edu. This form can be found on the U drive under Procedures – Scholarship Clearinghouse Procedures – Oss Item Type Request.

The completed request form must be submitted to Item Types (e-mail account).

Notify the department that the request has been submitted and that processing can take up to 1 month.
Other Key Concerns/Processes

Bursar Refund Policy
➤ Once the scholarship has been applied and disbursed to the Bursar system, the account will be credited. At this point either the system will generate a refund – ONLY if the student account balance is zero. If a balance exists funds will be applied to it first and then the excess will be refunded. Awards WILL NOT override an existing university balance and be refunded.

Changes in account numbers
➤ Expired account numbers – the OSS is not responsible for notifying you of your GL accounts that have expired. The system will automatically roll to a different account number in your area – usually your operating account. Please keep track of the expiration dates and request extensions as necessary or inform us of the new account numbers.

OneStart
➤ It is the student’s responsibility to check their OneStart account prior to inquiring about payments or awards. Online financial aid, bursar, and other student related information is easily accessible via OneStart. Please encourage your students to check for refunds, postings, etc. there prior to inquiring with the OSS.

Privacy Policy
➤ Per the privacy policy of the university – social security numbers are no longer being used to identify students. Please utilize the 10 digit university id number and/or the last four digits of the SSN when requesting an award to be processed.

Student Enrollment
➤ A student is required to have an active enrollment term (fall, spring, or summer) in order for an award to be applied. Actual registered hours is at the discretion of the department/school making the award.

Transferring Funds
With the implementation of the new departmental processing, departmental are required to create their own departmental account to transfer funds into. Departments will no longer be able to transfers foundation funds into the OSS account 25-891-23, or general ledger funds into our 24-891-25 account.
Terminology

**Athletic Scholarship** Scholarships awarded to IUPUI athletes upon meeting university and NCAA compliance regulations; varying and specific to: tuition, fees, housing, room, board, books.

**Award Clearinghouse** - The Office of Student Scholarship’s general e-mail. Used for all processing requests and inquiries relating to student awards. awards@iupui.edu.

**Cost of Attendance (COA)** - is a total figure estimated for Fall and Spring semesters for a typical full-time student. This amount is figured by using tuition, room and board, books, mandatory registration fees, cost of transportation and personal expenses.

**Department Scholarships** - The academic departments and schools at IUPUI also offer scholarships. The award amounts and criteria vary; however, scholarships are usually restricted to students majoring in a particular academic discipline.

**Disburse Aid** - the last step in student aid/scholarship awarding. Disbursed means that the monies in question have released electronically to the student’s bursar account and will either be applied to a current balance or refunded to the student.

**FAFSA** - Free Application for Federal Student Aid. Federal and State aid rely on the data from the FAFSA for consideration for grants and awards. Students financial need is based on the FAFSA form filed for the current academic year. The deadline to submit the FAFSA is March 10th of each year.

**Fee Remission** – Direct payment by a department to a students tuition and/or fees. Fee remissions are processed through the bursar office.

**Fellowship** - An amount of money awarded to aid an individual while pursuing avenues of research or study in graduate or professional programs. Typical fellowship awards are disbursed by semester or monthly to the student.

**Financial Need** – The dollar amount resulting from the difference between the Cost of Attendance and financial aid or scholarships awarded.

**GL Account** - General Ledger Account-School or departmental account that will be used for processing or transferring monies to student accounts or to the Office of Student Scholarships.

**Item Type** - twelve digit number used by the Office of Student Scholarships and financial aid which is affiliated with the departmental or school GL Account number, may be to a specific award or account number. Schools/departments may have multiple item types linked to various GL accounts.

**Pell Grants** – Federal award based on financial need as determined by the FAFSA.

**Private Scholarships** - Employers, private individuals, organizations and corporations are all contributors to private scholarships. These scholarships are awarded through the Scholarship Office and through departments within the university. Typically private scholarships arrive at the OSS in the form of a paper check which must be deposited and applied to the students account.

**NCAA** - National Collegiate Athletic Association
Scholarship - An amount of money paid to benefit a student while seeking an undergraduate or graduate degree.

Veteran Benefits - monies received following Department of Veterans Affairs (VA) regulations to supplement education, training or other standards set by the VA.

Other Important Terms

Semester Codes Used for Award Applications within the SIS System:

Fall Only award (FO) – lump sum award applied to the fall
Spring only award (SO) – lump sum award applied to the spring
Fall Multiple (FM) – the total amount will be applied and then disbursed in equal installments over the fall semester – 4 payments.
Spring Multiple (SM) - the total amount will be applied and then disbursed in equal installments over the spring semester – 5 payments.
Academic Multiple (AM) – the total amount will be applied and then disbursed in equal installments over the Academic year – 9 payments.
Academic Year (AY) – lump sum award split evenly across both terms.