



Student Financial Aid Office

Originate or Approve
a Scholarship Payment
Authorization Form

Job Aid

November 2014

Title	Originate or Approve a Scholarship Payment Authorization Form
Date	4/24/2008, updated 11/01/2014
Created by	Sylvia Bustard, Student Financial Aid Office Updated by Sheila Wilson, Student Financial Aid Office Lindy Lewis and Julie Kennedy, IS Application Support
Created for	Student Financial Aid Office Information Services Application Support
Copyright	Kent State University, © 2014 Ellucian Company L.P. and its affiliates
Get help with this process	Sheila Wilson, Office of Student Financial Aid swilso59@kent.edu (330) 672-0528
Technical support	http://support.kent.edu

Table of Contents

About the Scholarship Payment Application Work Flow.....	3
Get Help With This Process.....	3
Part I. Initiate and Submit a SPAF	4
Initiate a New Scholarship Payment Authorization Form	4
Open a New SPAF.....	5
Search for a SPAF in Progress or Completed SPAF	6
Identify the Aid Year and Scholarship Name	7
Enter Award Recipient ID(s) and Award Amount(s)	8
Modify a Previously Awarded Amount or Delete an Award.....	9
Submit the Authorization Request.....	10
Confirmation Email after Submission.....	11
Correct a SPAF After Submission	12
Part 2. Approve a SPAF Request	13
Access the Worklist.....	13
Open a Request Form	14
Add Comments, Approve or Return a SPAF.....	15

About the Scholarship Payment Authorization Work Flow

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

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

Get Help With This Process

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

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

1	Originator	
2	Dean-Level Authorizer	
3	Financial Aid Authorizer	

Contact the Help Desk at 330-672-HELP (4357) for technical support (*e.g. problems viewing or logging into Worklist or browser problems with the work flow.*)

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

Assistant Director
Marsha Kraus (330) 672-0513
mkraus1@kent.edu

Associate Director
Anissa Strickland 330-672-0517
agee@kent.edu

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

Part I. Initiate and Submit a SPAF

Initiate a New Scholarship Payment Authorization Form (SPAF)

The screenshot shows the Kent State FlashLine portal interface. At the top, the user is logged in as Mrs. Sheila A. Wilson. The navigation bar includes 'My Action Items' and 'My Tab'. The main content area is divided into several sections:

- My Banner:** Contains links for Banner INB, Advancement Officers Self-Service Banner, and Finance Self-Service Banner.
- Time Approval in Kronos:** Provides instructions for supervisors to approve timecards.
- Time Approval:** A section for time approval.
- Empower Timekeeping:** Includes a link for 'Time Approval & Scheduling (Supervisor)'.
- Workflow & Utilities:** The central section containing a list of workflow items:
 - Advisor Assignment Application
 - Banner Security Workflow (for Sec. Admins and Data Stewards)
 - Cellular Device Authorization
 - Course Catalog Update
 - Electronic Personnel Action Forms
 - Equipment, Vehicle & Vessel Acquisition
 - Expense Reimbursement
 - Grade Change
 - Grade Change Archive
 - Notice of Separation
 - Notice of Voluntary Separation Archived
 - Graduate Admissions History
 - Position Request Authorization (PRA)
 - Position Request Authorization (PRA) Tutorial
 - Scholarship Payment Authorization
- My Worklist:** Shows a table with columns for Organization, Workflow Name, Activity, and Created. The current entry is for 'SPAF006795: Geology Scholarship-AYR 1415 Performing'.
- FAMIS Resources:** Includes links for FAMIS Online Store, FlashTrack, and University Facilities Management Survey.
- Research Channel:** A section for research-related information.

Two red arrows are overlaid on the screenshot: one points from the 'Please note' text in the 'My Banner' section to the 'Scholarship Payment Authorization' link in the 'Workflow & Utilities' section, and another points from the 'Empower Timekeeping' section to the same link.

Step	Action
1	In FlashLine, locate and click the My Action Items tab.
2	Look for the Workflow and Utilities channel. Workflow items are listed alphabetically. Click Scholarship Payment Authorization .
3	If you do not see the tab, channel, or link, contact the Help Desk at 672-4357 . Say, "I am missing the --- tab in FlashLine" (or channel, or link needed.)

Open a New SPAF

Submission Date:	11/4/2014
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Begin a New Scholarship Payment Authorization:

- OR -

[Click here to search for Historical Scholarship Payment Authorizations](#)

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

Search for SPAF in Progress or Completed SPAF

KENT STATE UNIVERSITY

Name: Sheila A Wilson
Organization: Student Financial Aid Office

Submission Date:

Scholarship Payment Authorization

Search

Workflow Specific name: SPAF006800

Workflow Start Date Range: (mm/dd/yyyy) To

Workflow End Date Range: (mm/dd/yyyy) To

Search Clear Reset

<< Go Back to Main Menu

KENT STATE UNIVERSITY

Name: Sheila A Wilson
Organization: Student Financial Aid Office

Submission Date:

Scholarship Payment Authorization

Search

Workflow Specific name: %Wilson%

Workflow Start Date Range: (mm/dd/yyyy) To

Workflow End Date Range: (mm/dd/yyyy) To

Search Clear Reset

<< Go Back to Main Menu

Step	Action
1	Click the text link “ Click here to search for Historical Scholarship Payment Authorizations ” (as shown in p 5) to look up a SPAF in progress or one that is complete.
2	When you submit a SPAF , an email is sent confirming that the form is processing. The email also provides the form Reference Number. (see p. 11)
3	Copy and paste, or type the SPAF # in the Workflow Specific Name field, as in the example above. If you do not have the SPAF # , you can type in a “key” word of the scholarship. i.e., %Music% or part of the proper name, i.e., %Wilson%
4	Click Search . Search results of one or more forms will appear on the screen. Click a form title to open and view the information.
Note	To correct a form that has been submitted, contact the scholarship authorizer. Request that they open the form and click Return for Rework .

Identify the Aid Year and Scholarship Name

Academic Year: 1415

Scholarship: Schultz Architecture Sch (SPBG16)

		Amount			
ID	Name	Summer 14	Fall 14	Spring 15	Total
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

Totals:

Initial/Revised: Delete: Transaction:


Additional Comments (250 Character Maximum):
NOTE: Please do not use the following illegal characters: (,), %, ~, !, -

Route For Approval? Yes

Submit

Step	Action
1	Select the Aid Year (the school year in which aid is authorized) by pulling down the Academic Year menu of choices. Oftentimes we are working with two academic years. For example, 1415 is academic year 2014-2015 .
2	Select the name of the scholarship to be awarded from the pull-down Scholarship menu. The accounting information for the fund will appear to the right of the fund name. (You should only see the names of awards which you are personally authorized to process. Contact Financial Aid if there are errors in this list.)
STOP & CHECK	Confirm that the accounting information associated with the fund is correct. If you see an error, do not process the form. Contact Financial Aid immediately. Incorrect information will cause the wrong account to be billed. (see p. 8)
Note	One scholarship fund, and up to ten awards are accommodated per form.

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



Name: Sheila A Wilson
 Organization: Student Financial Aid Office

Submission Date:

Scholarship Payment Authorization

Academic Year:

Need help?

Scholarship:

➔
The accounting
 Account
 11374

If your scholarship is not listed or the corresponding index to be charged is incorrect, please contact Student Financial Aid.

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

ID	Name	Action
1. <input type="text" value="810456664"/>	Wilson, Sheila	Initial ▾
2. <input type="text"/>		Initial ▾
3. <input type="text"/>		Initial ▾
4. <input type="text"/>		Initial ▾

Step	Action
1	Type the Banner ID of an award recipient in the first ID field .
2	Press Tab . The recipient name should appear in the Name field. This is a double check to make sure the correct student ID# was entered.
3	Leave the Action column selection set to "Initial".

Amount			
Summer 14	Fall 14	Spring 15	Total
<input type="text"/>	<input type="text" value="5000.00"/>	<input type="text" value="5000.00"/>	<input type="text" value="\$10,000.00"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Step	Action
4	There are three term periods within a school year. Type the dollar amount of an award into the first appropriate term field.
Note	Never type a comma in a dollar amount.
5	Press Tab . The amount you typed will appear in the Total field .
6	If applicable, click in another term field and type an award amount.
7	Press Tab . The Total amount will update.
8	To change a figure, click twice in a field to highlight the dollar amount, and type over a new dollar amount. Press Tab to update the Total field.
9	To enter additional recipients for the same scholarship, go back to step 1.

Modify a Previously Awarded Amount or Delete an Award

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

Academic Year: 1415 Need help?

Scholarship: Angeloff Architecture Sch (SPBG11) The accounting i

If your scholarship is not listed or the corresponding index to be charged is incorrect, please contact Student Financial Aid.

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

ID	Name	Action
1. 810456664	Wilson, Sheila	Initial
2.		Initial
3.		Revised
4.		Delete

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

	Amount			
Action	Summer 14	Fall 14	Spring 15	Total
Revised		500.00	500.00	\$1,000.00
Initial				

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

Submit the Authorization Request

Transaction: \$1,000.00	
Route For Approval?	Yes <input type="button" value="v"/>
Approver: Sheila Wilson (swilso59)	
<input type="button" value="Submit"/>	

Step	Action
1	Some departments and scholarships route approvals through an Authorizer (Approver). If this option is available, you will see the question above. According to your department policy for the scholarship, select Yes to route authorization or No to bypass an Authorizer.
Note	Double-check the entries, because once the form has been submitted, you must call the authorizer to get it back in order to make corrections.
2	You may enter a comment in the Additional Comments field , if desired.
3	Click Submit to send the request to the next person in your approver chain.
4	When you Submit the request, the message below will appear, and an email is sent to you which contains the SPAF # of the request. (highlighted on p. 11)

Scholarship Payment Authorization

[Need help?](#)

You have successfully submitted this Scholarship Payment Authorization.

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

Confirmation Email After Submission

From: workflow@kent.edu [<mailto:workflow@kent.edu>]

Sent: Friday, October 10, 2014 9:03 AM

To: Klayko, Karil

Subject: Scholarship Payment Authorization SPAF006816 for FLA Scholarship-AYR 1415 has been submitted

Kent State University Workflow Notification

The Scholarship Payment Authorization SPAF006816 for FLA Scholarship has been submitted.

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

Reference Number: SPAF006816

Creator: Karil Klayko

Scholarship: FLA Scholarship-AYR 1415

Workflow Start: 10-Oct-2014 09:03:12 AM

Total Amount: 500

Last Action: Submitted For Approval

About this application...

The Scholarship Payment Authorization (SPAF) workflow application has been designed to allow Kent State University employees to submit Scholarship Payment Authorization requests in an electronic format.

Support...

Should you have any questions regarding scholarships or the scholarship authorization process, please contact:

Student Financial Aid:

Phone: (330) 672-2972

Email: finaid@kent.edu

Should you require technical assistance, please contact:

End User Support Services Help Desk:

Phone: (330) 672-4357

Email: helpdesk@kent.edu

Web: <http://helpdesk.kent.edu/>

Database version: Production

PLEASE NOTE: If the database version indicated above is not 'Production' please ignore this message. This message was sent from a test system during training or system testing.

Correct a SPAF After Submission

Student Career Path My HR **My Action Items** My Tab

Workflow & Utilities

Utilities

FlashCart Tap into this resource for purchasing power.

Imaging Resources

- Banner Integrated Document Imaging Applications
- Stand Alone Document Imaging Applications Reporting (Cognos)

My Worklist

Organization	Workflow Name	Activity	Created	Details
Root	SPAF006854: Math General Fund-AYR 1415 Ready	Processing	04-Nov-2014 03:42:42 PM	

Refresh Show Entire Worklist **Open Workflow**

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

Banner Workflow 8.2.0.1 (wfeP...)

Home

- Worklist
- Workflow Status Search
- Workflow Alerts

User Profile

- My Processes
- User Information
- Change Password

Worklist

Organization	Workflow	Activity	Priority	Created	
Root	SPAF006871: Architecture Scholarship-AYR 1415 Ready	Approval	Normal	04-Nov-2014 04:30:21 PM	
Root	SPAF006854: Math General Fund-AYR 1415 Ready	Processing	Normal	04-Nov-2014 03:42:42 PM	

1 - 2 of 2 First Previous Next Last Go to page: 1

Show Reserved Items

Top

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Part 2. Approve a SPAF Request

Access the Worklist

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

Kent State University Workflow Notification

The Scholarship Payment Authorization SPAF006871 for Architecture Scholarship has been routed to you for approval.

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

Reference Number: SPAF006871

Creator: Sheila Wilson

Scholarship: Architecture Scholarship-AYR 1415

Workflow Start: 04-Nov-2014 04:30:09 PM

Total Amount: 1000

Last Action: Submitted For Approval

The screenshot displays the FlashLine user interface. At the top, there are navigation icons for Directory, E-mail, Drive, Groups, Logout, and Help. Below these, the 'My Action Items' tab is active, showing a workflow for 'SPAF006871: Architecture Scholarship-AYR 1415' with an 'Approval' activity. A red arrow points to the 'Created' column for this item, which shows the date '14 04:30:21 PM'. The 'My Worklist' table also shows this item with a 'Processing' activity and a 'Created' date of '04-Nov-2014 03:42:42 PM'.

Organization	Workflow Name	Activity	Created	Details
Root	SPAF006871: Architecture Scholarship-AYR 1415	Approval	14 04:30:21 PM	
Root	SPAF006854: Math General Fund-AYR 1415	Processing	04-Nov-2014 03:42:42 PM	

At the bottom of the 'My Worklist' table, there are links for [Refresh](#), [Show Entire Worklist](#), and [Open Workflow](#).

Open a Request Form

Worklist


Organization	Workflow	Activity	Priority	Cr
Root	SPAF006871: Architecture Scholarship-AYR 1415 Performing	Approval	Normal	04
Root	SPAF006854: Math General Fund-AYR 1415 Ready	Processing	Normal	04

1 - 2 of 2 | First | Previous | Next | Last | Go to page: 1



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

Add Comments, Approve or Return



Name: Sheila A Wilson
 Organization: Student Financial Aid Office

Submission Date: 10/30/2014

Scholarship Payment Authorization

Reference Number: SPAF006862
Scholarship: SPMG02 - Architecture Scholarship
Academic Year: 1415

[Need help?](#)

The accounting information associated with this fund:

Account	Title	Percent of Charges
10216	Foundation Acct	100

If your scholarship is not listed or the corresponding index to be charged is incorrect, please contact Student Financial Aid.

ID	Name	Action	Amount				Total
			Summer 14	Fall 14	Spring 15		
1.	810005972 Kraus, Marsha	Initial		1000.00	1000.00	\$2,000.00	
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
Totals							

Initial/Revised:	\$2,000.00	Delete:	\$0.00	Transaction: \$2,000.00
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Enter Additional Comments (250 Character Maximum):

NOTE: Please do not use the following illegal characters: /, \, ~, !, -

Select a routing decision:

Previous Comments:

Date	User	Comment
10/30/2014	Marsha L. Kraus	Student may have funds if enrolled less than half-time.

Previous History:

Date	User	Status
10/30/2014	Marsha L. Kraus	Submitted



Step	Action
1	<ul style="list-style-type: none"> Check amounts and terms for accuracy. If the Action field indicates Revise or Delete, the payment amounts have been altered. Totals are automatically calculated.
2	Type a comment if you wish.
3	Choose Approve or Return for Rework .
4	Select another form in the workflow list, or Exit by closing the worklist.
5	If you do not wish to advance the form at this time, Exit without a decision. You may return to the Worklist later to select a decision.