



Scholarship Coordinator Handbook

Financial Aid & Scholarships

Table of Contents

[Rising Student Scholarships](#)

[Need Analysis](#)

[Notifying Recipients](#)

[Forms & Instructions](#)

[Instructions for posting scholarships](#)

[International Student Scholarship & Grants Checklist](#)

[Posting International Students](#)

[Posting Deadlines & Calendars](#)

[Disbursement](#)

[Scholarship Datamart](#)

Rising Student Scholarships and Application Process

Note - If you have any questions about RSS – please contact [Gail Sherron](#).

As the University embarks on Bold Aspirations, we have begun offering 4-year, renewable scholarships to incoming freshmen. Financial Aid & Scholarships will provide funding for those students until they declare majors, usually beginning the junior year. Once they declare, the College, schools, and departments have committed to taking over this funding as a part of the “Rising Scholars” program. Each year, departments will use the RSS report in the Scholarship Datamart to find out which students they must fund. Only after these commitments are met may the department decide on soliciting applications for excess funds for award (excluding special programs, such as Hixson Scholars, Multicultural, Marching Band, etc.).

If excess scholarship funds are available, it is up to the department to decide on the application process. Departments assume all responsibility for finding students that are eligible, based on KU Endowment Association rules and Donor Advised Agreements. Once eligible recipients are identified and notified of awards, scholarship staff in the academic units will begin the process of notifying FAS staff for posting to student accounts.

Need Analysis

Before submitting a student to FAS for posting, departments must be aware of the students that are eligible for need-based scholarship aid. Financial Need is a component of many KUEA funds and can be determined by using the Need Analysis report from the Scholarship Datamart. In order to be considered for need-based funding, students must have completed a FAFSA for the academic year being considered for award. Based upon several financial factors the FAFSA determines the Expected Family Contribution, thereby providing the amount of Financial Need for the student. As long as the Financial Need is below the Cost of Attendance, the student can be eligible for as much as the difference between Cost of Attendance and Expected Family Contribution.

$$\text{Cost of Attendance} - \text{Expected Family Contribution} = \text{Original Need}$$

$$\text{Original Need} - \text{Existing Awards} = \text{Remaining Eligibility}$$

For case-by-case assistance with determining a student’s eligibility for a need-based award, please contact Financial Aid & Scholarships.

Notifying Recipients

Students are notified of awards by departments by e-mail, mail, or in person. Departments should include information about the funding source, the amount, how to keep the scholarship in the future, if it is renewable, information about how it will process through the student account on Enroll & Pay, or other important information pertaining to the acceptance or maintenance of scholarship funding. Once a posting is completed, students will receive notice from Financial Aid & Scholarships that their financial aid package has been changed, with a prompt to check Enroll & Pay to see the full current aid package.

When notifying international students of scholarships, please include the International Student Checklist. For more information about international student scholarships, see the section on International Students.

Forms and Instructions

Posting forms, help documents and forms to request access to FAS systems may be found at <https://financialaid.ku.edu/forms-ku-scholarship-coordinators>.



Forms for KU Scholarship Coordinators

Please place a copy of your completed form(s) in your scholarship shared folder and send an email to scholaward@ku.edu

- [Domestic Student Scholarship Posting Request Form](#)
- [Domestic Student Change/Cancellation Form](#)
- [Domestic Student Force \(Override\) Request Form](#)
- [International Student Scholarship Posting Request Form](#)
- [International Student Change/Cancellation Form](#)
- [International Student Force \(Override\) Request Form](#)
- [Scholarship Coordinator Handbook](#)
- [Scholarship Guiding Principles](#)
- [Domestic Posting Instructions](#)
- [International Posting Instructions](#)
- [Scholarship Shared Folder Access Request Form](#)
- [Scholarship Shared Folder Instructions](#)
- [FAS Code of Responsibility](#)
- [International Student Need Analysis Worksheet, 2021-22](#)
- [Datamart Access Request Form](#)
- [Datamart Users Guide](#)
- [Rising Student Scholarships Datamart Users Guide](#)
- [Log Into Scholarship Datamart](#)

Instructions for Posting Scholarships

Posting Requests (Domestic)

Domestic posting request forms are required for all postings to be completed. It comes in the form of an Excel file, and should include student identifying information, as well as funding source information, such as Item Type (usually begins with 86000000xxxx with the last 4 or 5 digits being the unique identifiers), item type name, amount, and whether or not the scholarship should be split between fall and spring. We also have the capability to customize the amounts for spring or fall, so please be specific in exactly how much the student should receive each semester.

Once the form is completed, you may save the file into your shared folder. The folder requires access be granted by IT staff, and will appear as one of your network drives. Information regarding how to access your folder will be given to all coordinators with access when it is granted. If you have questions after that point, contact Missy Somers, or a departmental IT person for assistance.

After the scholarship file has been saved to the shared drive, please send an e-mail to scholaward@ku.edu, along with the file name so FAS staff may begin the posting process. We ask that all coordinators send requests to a generic e-mail in case scholarship staff members are out for extended periods, or if there are emergencies while they are away from the office. If e-mails are sent to a single staff member, processing may be delayed.

Domestic Posting Forms

1. Domestic Posting Request – Submit student identifying and funding information for all domestic and resident alien students.
2. Domestic Change/Cancel Request – Changing or cancelling an award at any time of the year. Changes may include: increasing awards, reducing awards, or cancellation.
3. Domestic Force (Override) Request – Departments must authorize funding to disburse for under-enrolled students. This may include thesis/dissertation hours, or those that are near graduation.

International Student Scholarship & Grant Checklist

International students have extra steps that will be necessary to complete before scholarships and grants may be posted. This checklist may be included with award notification and lays out the necessary steps for international students to be able to receive their scholarships and financial aid in a timely manner. The most current version of this Checklist is available on the Scholarship Coordinator website referenced above.

If you wish to award a need-based scholarship to an international student (or a student who cannot complete a FAFSA due to citizenship issues), you will need to ask that student to fill out FAS's Institutional Student Need Analysis Worksheet (ISNAW). This is available at <https://financialaid.ku.edu/forms>. Please note that multiple aid years may be available at the same time, so be sure that the student is filling out the one that corresponds with when they will be receiving the aid.

Scholarship coordinators are asked to identify their international recipients when able. Those that have access to Enroll & Pay may follow the path: Campus Community >>Personal Information (Student)>>Identification (Student)>>Citizenship>>Citizenship and Passport. Only when a student is classified as "Alien-Temporary" is he or she considered an international student necessitating GLACIER.

Additionally, the "Review Recipient Citizenship Status" report on Datamart can be used to identify citizenship status.

If there are any questions about citizenship status, coordinators may contact FAS staff for clarification. Please do not use outdated lists or reports, since citizenship status may change at any time.

Posting International Students

International students must go through extra processing by Student Accounts and Receivables (SAR) before scholarships can post to their student accounts. Regulations require KU to determine if the student will be taxed on the scholarship amount, and in order to do so we must collect supplemental information from the student before we are able to complete the file. This process is called GLACIER, and uses information such as the student home country, amount of funding for the year, tuition charges, etc.

Students are required to submit once every 365 days, so it is possible that SAR can process GLACIER without updating paperwork. Because of this, please do not send students straight to SAR. Instead, let them know that it may be necessary to update the file. If the paperwork is necessary, the student will receive an e-mail from SAR staff and GLACIER. The subject line will always contain a reference to GLACIER so it is easily identifiable. Once the required information is submitted, SAR will place a tax charge on the student account, if applicable, and authorize Financial Aid & Scholarships to post the award to the student account for disbursement. The timeline for posting completion is subject to how quickly the student can satisfy GLACIER requirements, so is not subject to the typical 3-5 business day processing time for domestic students.

Since there is a delay for international student postings, they will not show in Scholarship Datamart reports until they are released by SAR and posted to the student account. It is crucial that departments have knowledge about how much

money has been committed to international students in order to maintain budgets and the ability to fully fund all of the international and domestic student awards committed for the academic year.

Financial Aid & Scholarships and SAR each maintain a list of all international student scholarship submissions. Every 30 days after the initial GLACIER information request, a reminder is sent if a student is incomplete. Between FAS and the academic department, a deadline will be established (usually 1 week) for the student to fulfill the GLACIER obligation, or the scholarship will be cancelled.

International Student Posting Forms

1. International Student Posting Request - Submit student identifying information for all Temporary Alien students.
2. International Student Change/Cancel Request – Changing or cancelling an award at any time of the year. Changes may include: increasing awards, reducing awards, or cancellation.
3. International Student Force (Override) Request – Departments must authorize funding to disburse for under enrolled students. This may include thesis/dissertation hours, or those that are near graduation.

Posting Deadlines and Calendars

Projections

Each November, KU Endowment provides the preliminary projections for the coming scholarship year that begins the following fall. This data can be used when determining funding for Rising Scholars, as well as budgeting extra funds for award. In late February, KU Endowment closes the books on the current scholarship year to consolidate financial records. In mid-March, KU Endowment releases the final projections for the next academic year and departments may begin making awards again. However, if awarding late spring or summer scholarships, the allocation for the coming academic year will be reduced commensurately. For example, if posting a summer scholarship of \$500, the fall allocation from KUEA will be reduced by \$500 in order to keep the spendable allocation in balance.

Deadlines and late awarding consequences

Each year, Financial Aid & Scholarships adheres to a calendar to guarantee timely and accurate postings that provide the best aid package possible. As a part of that effort, departments are asked to adhere to a deadline calendar so aid packages are not affected adversely by additional, late scholarship postings. Additionally, we ask that departments post the full academic year award together to allow students to budget their financial aid throughout the year, as well as minimize impacts on awards that are posted for the spring semester.

If departments are waiting for fall grades to post before awarding spring monies, Financial Aid & Scholarships recommends posting the full award year by July 1 for all students. Those that fail to make grades, change majors, withdraw, etc., may be cancelled after grades are finalized, but before spring disbursement in early-mid January.

June 1 – Fall/Spring postings due (Fall bills generate August 21, balance due September 15)

December 1 – Spring only postings due (Spring bills generate January 21, balance due February 15)

April 1 – Summer postings due (Summer bills generate April 21, balance due May 15)

Failure to meet these deadlines may result in delayed processing and student inquiries to departmental and FAS offices. In addition, late postings may result in students receiving less aid in the subsequent spring term. And in some cases, students may have to pay balances back to KU in over award situations. Financial Aid & Scholarships does not aim to

“punish” students or departments for late awards; rather we strive to provide the best package possible, while adhering to strict government regulations and policies on financial aid.

Disbursement

Disbursement begins at the beginning of each semester. When scholarships disburse, funds cycle through the student account, first paying any charges for that term’s bill. If the student balance is paid in full, any remaining scholarship funds or other aid is refunded to the student. The University of Kansas requests all students to have direct deposit in order to save time and processing on writing and mailing checks to students.

Unless otherwise specified by donors and departments, scholarships will only disburse when the student is enrolled in 12 undergraduate hours or 9 graduate hours. This follows the federal methodology concerning full time enrollment, and allows Financial Aid & Scholarships to ensure that students are enrolled in enough hours to satisfy donor requirements and maintain a proper graduation track. Circumstances may dictate that a student should receive their scholarships if they are enrolled less than full time. These can include, but are not limited to: needing fewer hours to graduate, dissertation hours, internship hours, or enrollment in part time programs. It is the position of Financial Aid & Scholarships that departments are made aware of under-enrolled students before scholarships can disburse. In order to override the enrollment criterion, departments may complete a “Force” form (found at <https://financialaid.ku.edu/forms-ku-scholarship-coordinators>), which gives FAS departmental authorization to manually push the funds through the student account. However, departments may also elect to reduce the amount of the scholarship, require students to add hours, or cancel.

Financial Aid & Scholarships requests departments track the enrollment and disbursement of their own students in the Scholarship Datamart before the term begins by monitoring the enrollment of students and providing authorization to force, if applicable, before the semester begins. Departments that are proactive in this task allow Financial Aid & Scholarships to disburse aid and serve students in a much quicker manner. Financial Aid & Scholarships monitors under-enrollment and will contact departments to notify them of students that will be cancelled on or before the 20th day of classes (10th day of summer classes). Students must also self-report the hours in which they will be enrolled on Enroll & Pay to ensure timely disbursement of other federal, state, and institutional aid.

Scholarship Datamart

The Scholarship Datamart is a tool in Oracle Analytics Cloud (OAC) to aid in the posting and disbursement tracking process, as well as aid in the awarding of eligible recipients. To access the Scholarship Datamart, coordinators must log into OAC at <https://oac.ku.edu/analytics>. Detailed information may be found in the Help Documents and tutorials found within the Scholarship Datamart.

Once disbursement begins, all scholarship coordinators have the ability to monitor disbursements to ensure postings are completed properly, and to ensure disbursement issues, such as under-enrollment, can be addressed in a timely manner. Should coordinators see anomalies between submitted posting requests and information contained in the Scholarship Datamart reports, please contact Financial Aid & Scholarships staff for an explanation or to identify a course of action for resolution.

The Scholarship Datamart system is not integrated with IFAS, the KU Endowment accounting system. For this reason, Scholarship Datamart fund balances may not match with IFAS if a donation is received after projections are released. KUEA staff must notify FAS staff that the new monies are expendable, allowing FAS to add the funds to Enroll & Pay. If KUEA staff members are unaware the gift is intended to be spent, they will not notify FAS staff, creating delays and extra communications between the academic department, FAS, and KU Endowment.