

Financial Aid Award Workflow

This guide outlines the new features of the Financial Aid Award workflow for Qualified/Non-Qualified Scholarships and Academic Awards to enrolled students. The new workflow will incorporate Tuition Grant Awards (TGA), Graduate Commonwealth Awards (GCW) and Scholarship/Fellowship payments (SCH) and eliminate a majority of the manual paper based forms that require signatures from multiple offices. The new workflow will automatically route the award to the appropriate office based on user-entered information. A Payment to Students flowchart is available at <https://fiscal.gmu.edu/wp-content/uploads/2017/11/Payments-to-Students-Flowchart.pdf>.

A guide detailing the different types of payments made to undergraduate and graduate students, including payment processing for non-enrolled students, is available at <https://fiscal.gmu.edu/wp-content/uploads/2017/11/Payments-to-Students-Guide-Detailed.pdf>.

***The Request for Scholarship or Fellowship Payment (manual form), will be accepted through February 1, 2018.** Individuals who process Scholarship or Fellowship Payments for enrolled students are encouraged to review their access to Workflow and begin utilizing FIN_Financial Aid Award for Spring 2018.

Access

Individuals who currently have access to the FIN_Tuition Grant Authorization will automatically have access to FIN_Financial Aid Award. Users will no longer see FIN_Tuition Grant Authorization as an option in Workflow.

Individuals who do not currently have access to the application should contact their [Departmental Banner Liaisons](#) for access approval. The Departmental Banner Liaison will send an email to the Finance Administrative Systems Team (FAST) to request user access. FAST will notify the user and liaison once the request has been completed.

Highlighted Changes

	CURRENT WORKFLOW	NEW WORKFLOW
Workflow Name	FIN_Tuition Grant Authorization	FIN_Financial Aid Award
Type of Aid	Institutional Awards (IA) and Graduate Commonwealth (GCW) Awards	Tuition Grant Award (TGA), GWC, Scholarships and Fellowships (SCH)
Scholarships and Fellowships	Currently paid to students through AP via paper request forms	Will be entered in the Banner Student Module. Award will pay outstanding charges first and a check will be issued for the balance.
Students' Academic level	Any academic level student	Undergraduate, Graduate, Law, Non-degree, Continuing Education students
International Students	Paper forms are manually routed to the International Tax Office to determine whether tax withholding is required	In Workflow, certain citizenship statuses will be <u>electronically</u> routed to the International Tax Office to determine whether tax withholding is required. Net amount (amount – tax) will be posted to student account
Tax Withholding for International students and "Tuition Only" = No	Tax withholding is determined and the tax is deducted from original amount. Student receives net amount.	In Workflow, the Initiator will be asked to provide the fund/org where the tax withholding amount should be charged <u>and</u> if The Department will gross up the payment student receives an email (to the address entered under <u>Int'l Student's Email</u> : by the initiator) if taxes are withheld
Award letter /documentation	Optional	Required for International Students and "Tuition Only" = No

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	CURRENT WORKFLOW	NEW WORKFLOW																
		Information at the bottom of the page is also required for international students and "Tuition Only" = NO. Initiator gets an "error" email if information is not filled out.																
Scholarships for non-enrolled students	Not included in current workflow. Processed through hard copy forms.	Not included in new workflow yet. Processed through hard copy forms. Initiator will be asked if award is for non-enrolled students or if the request is for externally funded fellowship awards. WF will automatically stop transaction (and send the initiator an email with links to paper form).																
Externally funded Fellowship (78522)	Same as above	Same as above																
Accounts Included	78560 - Undergraduate Tuition & Fees 78510 - Masters Tuition & Fee 78515 - Doctors Tuition & Fee Tuition Only = Yes or Tuition Only = No for any of the accounts above	<table border="1"> <thead> <tr> <th>Account Code</th> <th>Tuition Only?</th> </tr> </thead> <tbody> <tr> <td>78560 - Undergrad Tuition & Fees</td> <td>Yes</td> </tr> <tr> <td>78510 - Masters Tuition & Fee</td> <td>Yes</td> </tr> <tr> <td>78515 - Doctors Tuition & Fee</td> <td>Yes</td> </tr> <tr> <td>78525 - Graduate Health Subsidy <i>See Note Below</i></td> <td>No</td> </tr> <tr> <td>78566 - Undergraduate Academic Scholarship</td> <td>No</td> </tr> <tr> <td>78570 - Undergraduate Scholarship</td> <td>No</td> </tr> <tr> <td>78520 - Graduate Scholarship/Fellowship</td> <td>No</td> </tr> </tbody> </table>	Account Code	Tuition Only?	78560 - Undergrad Tuition & Fees	Yes	78510 - Masters Tuition & Fee	Yes	78515 - Doctors Tuition & Fee	Yes	78525 - Graduate Health Subsidy <i>See Note Below</i>	No	78566 - Undergraduate Academic Scholarship	No	78570 - Undergraduate Scholarship	No	78520 - Graduate Scholarship/Fellowship	No
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Tuition Only?	Tuition Only=Yes only pays tuition and fees in the student account. Tuition Only =No pays any outstanding charges in the account	No changes. Tuition Only=Yes only pays tuition and fees in the student account. Tuition Only =No pays any outstanding charges. That includes the new account codes 78525, 78566, 78570 and 78520.																
OSP Approval	Any award with a grant funding source	Workflow will electronically send any award with a grant funding source and accounts 78560, 78510, 78515 and 78525 (only) to OSP for approval																
To start a new transaction	1. Workflow specific name 2. Student last name 3. Student G-Number	1. Workflow specific name 2. Student last name 3. Student G-Number Also: 4. Tuition Only? ("No" = refundable.) ("Y", "Yes", "N" and "No" are acceptable for answer)																
Auto Initiate Spring Award	Not included in current workflow	Option to Auto Create a Spring transaction for Tuition Only "Yes"																
Student's Academic Level Information	Not retrieved by workflow	Will query Banner to retrieve the student's academic level using G-Number and max(term code)																
Number of Funding Sources	4	3																

Note: Account 78525 is to be used for students who do not meet eligibility requirements for the student Graduate Health Subsidy paid by the Provost Office but where the department is funding the health insurance premium expense. Provost Graduate Health Subsidy will continue to be processed by the Provost Office and NOT through workflow.

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Initiate a Workflow Transaction:

1. Go to <https://workflow.gmu.edu:4443/wfprod>. Login with your Mason Net ID and Password.
2. To start a workflow transactions, click the “My Processes” link from the left-side menu. Select **FIN_Financial Aid Award**.
3. Enter a *Workflow Specifics Name* in the following format: Award Type (GCW, SCH, TGA), Student Last Name, and Term (e.g. “SCH-Smith-201770”).
4. In the *Required Parameters* field, enter the Student G-Number and Student First and Last Name.
5. Select “Yes” or “No” for the question *Tuition Only? An award letter (or other documentation) may be attached on this page or on the following page. **Award Documentation is required for International Students when “Tuition Only” = No.***
6. Click “Start Workflow” and then “OK.” Click on *Worklist* from the left-side menu. You should see the workflow instance. *Click the browser “Refresh” button periodically until the workflow instance appears.*
7. Once the transaction appears in the *Worklist*, click the link (e.g. “SCH-Smith-201770”) to open the transaction and enter data.
8. After selecting Academic Term (ex. Fall 2018), enter “Y” or “N” to the question that follows, to auto create a Workflow instance based on data entered for the next term (Spring). *The auto create option is only available for “Tuition Only = Y” and Fall term selection.*
 - *If “Y” is selected, a new Workflow instance is created for the Spring term. Users must take action on this new instance and have the ability to change the fund/org and/or amount if desired. The Spring Workflow instance must be completed in order to post to the student account.*
9. Enter additional details including Funding Source(s), Transaction Amount, Requires Approval, and Requires PI Approval. *An award letter may be attached here.*
10. Select “Complete” to send the transaction to the Approver(s). You should receive a confirmation email indicating the type of award transaction and other student information. If there was an error, you should receive an email explaining the error and appropriate correction.
11. You should receive an email once all approvals have been received and Financial Aid has entered the award in Banner.

Additional information on processing payments to students using Banner Workflow is available at <https://fiscal.gmu.edu/fast/workflow/>.

For additional information related to Financial Aid Award Workflow please contact the Financial Aid Office at extension 3-2347 or email latienza@gmu.edu.