

Outside Scholarships

PROCEDURES

PROCESS IMPROVEMENT 5/2018

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1.0 FUNDS RECEIVED

Funds are received by check or cash to the Bursar Cashiers.

1.1 BURSAR CASHIER – RECEIPT FUNDS

- 1.1.1 Funds posted to Student Account.
- 1.1.2 Cashier will scan check, receipt and supporting documents and email to Bursar-Outside Scholarship LDAP group 'Bursar Scholarship 'bursar_schol@memphis.edu'.
- 1.1.3 Deliver originals to Bursar Asst. Manager.

1.2 BURSAR ASST. MANAGER - CREATE OUTSIDE SCHOLARSHIP FORM

- 1.2.1 Bursar Asst. Manager will receive scanned .PDF form of the check, receipt and supporting documents.
 - Open scanned document and validate it clear. Save scanned document to desktop.
 - Login into Banner and validate funds posted to correct student account.
 - Determine if Athletic student.
 - Originals - file and save for 30 days, then shredded.
- 1.2.2 Login into DocuSign and create the correct Outstanding Scholarship form.
 - Non-Athletic.
 - Athletic.
 - Attach scanned .PDF document to form.
 - Automated email notifications are sent to appropriate DocuSign group.

2.0 SCHOLARSHIP OFFICE - NON-ATHLETIC STUDENTS

- 2.1.1 Login DocuSign and review form.
- 2.1.2 Login to Banner and validate student's eligibility to receive funds.
 - Student eligible –
 - Validate if need to adjust budget before awarding.
 - Enter award on Banner form 'RPAAWRD'
- 2.1.3 Update Outside Scholarship form with decision to Approve or Decline.
 - Automated email notification will be sent to Bursar DocuSign group.
 - If Decline – see Section 4.0 Bursar Return Funds to Donor

3.0 ATHLETIC OFFICE - ATHLETIC STUDENTS

Athletic Students must complete and deliver the 'Athletic Outside Scholarship' information request form.

3.1 ATHLETIC COMPLIANCE ASSISTANT DIRECTOR

- 3.1.1 Login DocuSign and review form.
- 3.1.2 Email the student a hyperlink to the 'Athletic Outside Scholarship' request form with instructions that the form must be completed by the donor and returned to the Athletic department.
- 3.1.3 When 'Athletic Outside Scholarship' form is received:
 - File the form.
 - Validate Student eligible to receive funding.
- 3.1.3 Update DocuSign Outside Scholarship form with decision to Approve or Decline.

- Approved
 - Automated email notification will be sent to Financial Aid Associate Director.
- Decline
 - Automated email notification will be sent to Bursar DocuSign group. See Section 4.0 Bursar Return Funds to Donor

3.2 FINANCIAL AID ASSOCIATE DIRECTOR

3.2.1 Login DocuSign and review form.

3.2.2 Login to Banner and validate student's eligibility to receive funds.

- Student eligible –
 - Validate if need to adjust budget before awarding.
 - Enter award on Banner form 'RPAAWRD'

3.2.3 Update Outside Scholarship form with decision to Approve or Decline.

- Automated email notifications will be sent to Athletic and Bursar DocuSign groups.
- If Decline – see Section 4.0 Bursar Process Return to Donor.

4.0 BURSAR – RETURN FUNDS TO DONOR

After careful review, it was determined the scholarship funds could not be awarded at this time.

4.1 BURSAR – BURSAR MANAGER

4.1.1 Received notification Outside Scholarship was declined.

4.1.2 Login to DocuSign

- Validate donor and funds to be returned

4.1.3 Login to Banner

- Post Detail Code = MOTJ a negative amount to the student account.
- Post Detail Code = MO04 a positive amount (clearing account).

4.1.4 Email DocuSign .PDF copies to Assistant Manager Student Accounts.

ARGOS AUTOMATED EMAIL BURST:

4.1.5 Following morning Argos email burst will process and email the student the scholarship funds will be returned to donor. See Appendix A.

WHEN REFUND CHECK IS PRINTED:

4.1.6 Write a letter of explanation, attach the refund check and mail to the donor.

4.2 BURSAR - ASSISTANT MANAGER STUDENT ACCOUNTS

4.2.1 Login into Banner and validate if donor vendor UID exists and W9 is on file.

- If donor does not exist, contact donor to complete W9 form.
- Create Vendor ID when W9 form received.

4.2.2 Post Detail Code = MO04 (clearing account) as a negative amount.

4.2.3 Post Detail Code = RFBA generate check.

APPENDIX A – EMAIL

A.1 Funds Being Returned to Donor

From: The University of Memphis, Bursar's Office [<mailto:donotreply@memphis.edu>]

Sent: Wednesday, May 23, 2018 11:14 AM

To: {student}

Subject: Outside Scholarship Update

Dear {First name Last Name},

After careful review of your account, it has been determined that your outside scholarship cannot be disbursed at this time. The funds will be returned to the donor within 5 to 10 business days.

If you have questions, please contact our office at bursar2@memphis.edu.

Best Regards,

Bursar's Office