

**Scholarship Award Summary Sheet Instructions for**

**Initial Awards, CORRECTIONS and Summer Awards**

**Before you Begin:**

* **See Timeline or contact FAO or Foundation if you are not sure how you should make an award (Portal v. Award Summary Sheet).**
* **Use the appropriate Award Summary Sheet AFTER Portal cycle management has occurred for the CURRENT award year.**

 **Initial Award Summary Sheet Instructions:**

Please make sure to complete the top section and include: Department Name (Math, English, Forestry, etc.), Full Name of person submitting award summary sheet and Extension. This makes it easier for our office to communicate directly with you to ensure award sheets are processed in a timely manner and if any questions arise we can contact you.

Include all information electronically using the Scholarship Award Summary Sheet. Please note there is a separate Award Summary Sheet for summer. If awarding a summer scholarship, please contact the Foundation for this form.

***DO NOT submit an Award Summary Sheet if you have made, or plan to make awards on the UM Scholarship Portal.***

Below we have provided instructions for how to complete each of the columns on the Award Summary sheet form:

* UMF Fund – (IF YOU ARE NOT USING A FOUNDATION FUND YOU DO NOT NEED TO list a UMF FUND number)
	+ All Foundation Funds **MUST** list the **UMF Fund** number.

Typically, the last three letters/digits of the Auxiliary Fund Code (This can be found in the UM Scholarship Portal in the Basic Information section of the specific portfolio as well as the budget reports compiled by UMF)

* B.S. Index Paid From
	+ Index that Financial Aid uses to add the award to student accounts
	+ The index is typically three letters followed by three numbers, such as ABC123
	+ If using a waiver account then usually four letters and then followed by two numbers, such as ABCW01
* Activity Code
	+ Only used if you are not using a UMF Fund and you have a specific Activity code it must be put under; i.e. SPABA accounts.
* Name of Scholarship and/or purpose of awards if applicable
	+ Please list the full name of scholarship
	+ If using a general fund please include the purpose of the award i.e. travel reimbursement, supply reimbursement, conference fees,
* Last Name
* First Name
	+ Please use first name that is in banner (nicknames can be confusing)
* Student ID#
	+ Please check that you have entered the correct student ID to ensure the award is made to the appropriate student.
	+ You do not need to include hyphens (790-XX-XXXX) but doing so may help with accuracy.
* Level (Undergrad or UG/Grad/LAW)
	+ From the drop-down menu select the student’s level:
		- Undergraduate Freshman (UG Freshman)
		- Undergraduate sophomore (UG Sophomore)
		- Undergraduate junior, (UG Junior)
		- Undergraduate senior, or post-baccalaureate (UG Senior)
		- Graduate (includes masters or doctoral student)
		- Law (especially if there are dual law majors, please input LAW)
* Total Award Amount
	+ Please check that the copy clearly displays the Total Award Amount. You may need to widen the column slightly to fit the dollar amount.
* How to Payment Option
	+ From the drop-down menu please select how you would like the scholarship award to pay out.
		- Full Year (50/50) (Total award amount split in half to be equally distributed between fall and spring)
		- 100% Fall – Total Award Amount applied for fall only
		- 100% Spring – Total Award Amount applied for spring only
		- Awards made late in the academic year **must** be made on the appropriate award summary sheet.
		- Please contact the Foundation **before** making a summer award.
* Minimum Number of Credits Required for Disbursement
	+ From the drop-down menu please select the credit range the student must be minimally registered for:
	+ For Undergraduates (UG)
		- Please specify the student(s) credit load minimum in order for our office to ensure the disbursement is set up correctly. When scholarships are entered in Banner it defaults to 12 or more credits per semester required for disbursement and can prevent students who are enrolled in less to not have their scholarships pay out in a timely order.
	+ For Graduate OR Law
		- Please specify the student(s) credit load minimum in order for our office to ensure the disbursement is set up correctly. When scholarships are entered in Banner it defaults to 12 or more credits per semester required for disbursement, even though most graduate students are considered full time at 9 credits and can prevent students who are enrolled in less to not have their scholarships pay out in a timely order.
* Notes/Additional Information
	+ Any additional information can be entered here, such as GPA or reason for awarding scholarship.

Please sign and email the form to fascholarships@mso.umt.edu for the Financial Aid office to process the awards and copy the Foundation at UMFAwardSummarySheets@supportum.org for their records. This can be one email. **Be sure to reference in the email subject line the department and the academic year of the awards.**

**Helpful communications to YOUR students:**

* If you are awarding a NEW student a scholarship through the Scholarship Award Summary Sheet you will need to notify the student that they are receiving the award. Financial Aid and the Foundation do not notify students that they have received an award. Financial Aid ONLY processes the forms/awards.
* Scholarships will reflect on a student’s account AFTER the Financial Aid Office has processed the form. Please take this into consideration when notifying your students of awards and that it may not be an instantaneous credit applied. Processing times vary throughout the school year.

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**TIP: Inserting additional rows**

* Please note if you need to insert a row to add additional students, you will need to right click a current row and select “insert”, in order to ensure all the drop-down options roll forward.

**CORRECTION Instructions:**

**You will need to use the Scholarship Award Summary Sheet CORRECTION (excel).**

**Before you begin with CORRECTIONS:**

* **ALWAYS submit a CORRECTION sheet if you are making a change with scholarship or recipient. Even if you made the change on the Portal, a CORRECTION sheet must be completed.**
* **Basic instructions are included in the copy of Scholarship Award Summary Sheet CORRECTION workbook. The examples are also listed in the workbook to help guide you in completing the CORRECTION worksheet.**

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| **Types of Common Corrections:** | **Tab in Workbook** |
| Cancellation of an award completely (if student is no longer eligible or not attending) | **Example A** |
| Changing the Total Award Amount (increase or decrease) | **Example B** |
| Changing an award How to Pay Out from 50/50 to 100% Fall (ex: due to early graduation) | **Example C** |
| Changing the fund/index or scholarship from one to a different index | **Example D** |
| Changing the “Minimum # of Credits” | **Example E** |

If you are changing anything, please enter the **original award** on the first line and then add the **correction** below in a new line. If you are canceling the award completely you can enter all the information and list the amount as a negative to let us know to pull back those funds. If multiple corrections are needed please repeat the order, original award then follows the correction, next original award then next correction, etc. This will help save paper. If you need to make a correction not listed above, please contact the Financial Aid Office for assistance.

**BE SURE TO USE THE APPROPRIATE ACADEMIC YEAR AWARD SUMMARY SHEET FOR THE AWARD(S) YOU WISH TO CORRECT/CHANGE.**

Corrected Award summary sheets must be signed and sent to Financial Aid fascholarships@mso.umt.edu for processing. It is required that you CC the Foundation at UMFAwardSummarySheets@supportum.org and Barb Bybee in Business Services barb.bybee@mso.umt.edu on your email to Financial Aid.

**Helpful communications to YOUR students:**

* If a student is no longer receiving a scholarship with a total or partial loss of a scholarship, the department is responsible fornotifying the student of changes. If the student is concerned about how that will impact their financial aid or student account, please have them contact the financial aid office for more information.
* If you are awarding a NEW student scholarship due to a cancellation of another, the department should notify the NEW student as well. If the student has questions about how this new award will impact their financial aid or student account, please have them contact the financial aid office for more information.

**Summer Award Instructions:**

**You will need to use the Scholarship Award Summary Sheet SUMMER (excel).**

If you need to make a SUMMER award you will need to request the Scholarship Award Summary Sheet SUMMER and it MUST be sent to the Foundation for approval. This ensures that funding is available for the award you are trying to make.

Summer scholarships begin the new fiscal year for Foundation fund budgets. Once the Foundation approves it, the Foundation will send it to the Financial Aid office.

Please sign and email the form to the Foundation at UMFAwardSummarySheets@supportum.org for their approval of summer scholarships. Once the Foundation reviews it they will pass it on to the Financial Aid office to process. MAKE sure to reference in the email subject line, the Department Name – Academic Year – SUMMER.

**Contact Information:**

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| **Financial Aid Contacts** | **Office: x 5373** | **fascholarships@mso.umt.edu** |
| Shylar Wilson | x 5510 | Shylar.wilson@mso.umt.edu  |
| Christina Peltier | x 4810 | Christina.peltier@mso.umt.edu  |
| Ginger Lowry  | x 6802 | Ginger.lowry@mso.umt.edu  |
|  |  |  |
| *Office Location: Lommasson Building* |
| **UM Foundation Contacts** | **Office: x 2593** | **UMFAwardSummarysheets@supportum.org** |
| Korla McAlpine | x 4260 | Korla.mcalpine@supportum.org  |
| Sarah Wade | x 5592 | Sarah.wade@supportum.org  |
| Nancy Randazzo | x 4739 | Nancy.randazzo@supportum.org  |
|  |  | *Office Location: Gilkey Building* |

*Reminder: Please DO NOT send completed award summary sheets to individual staff members, send to the office designated email accounts listed above for your reference.*

Thank you,

Financial Aid Office and UM Foundation