How to Enter Departmental Awards

This guide will cover:

- Entering Departmental Awards through Manual Award Entry

Unlike the E-160 process used for making awards in UniverSIS, in Catalyst departmental awards are created through the Financial Aid module and then fed to the student’s bill through the aid disbursement process.

If you add departmental awards after the student has been packaged by Student Financial Aid (SFA) Catalyst will make automated adjustments to a student’s other aid sources to prevent a student from being over-awarded as required by federal and institutional policy. You may also add awards prior to a student being packaged by SFA, and SFA will take your departmental awards into account at the time of packaging to ensure that awards are fully compliant. As with UniverSIS processes, the sooner you make your departmental awards, the better it is for your students and staff.

The process outlined below is for awarding departmental awards for the academic year. The default split for awards is Fall-Spring, but you can override that default with any combination of Fall/Spring/Summer terms. All institutional awards should be awarded using the OA or MA disbursement plans.

Step One

Navigate to the following breadcrumb:

Step Two

Complete the following field in the Search Criteria:

- ID
- Academic Institution
- Aid Year
If the ID is not available, use the Last Name, First Name, Campus ID (UCID) or National ID (SSN) fields to refine the search. Click on the Search button once the values are entered. The Manual Student Packaging tab should load with the student’s award package for the specified aid year. If it does not and you get a 'No Matching Values were Found' message contact the Financial Aid office to verify if the student has been Aid Year activated, had FA Term built and FA budgeting completed.

**Step Three**

- Click the **plus** sign associated with the last row (the row with the highest line sequence number). A new row should be added below the existing row.
Step Four

- Leave the default value in the Nbr column.
- When adding a new award you’ll need to determine the action, the item type number, award amount and the split code.

Step Five

- Click the magnifying glass next to the Action field and select a value.
- Always use B (Offer/Accept).

**KEEP IN MIND:** Our students are not able to accept grant/scholarship funds on their aid awards.
Step Six

- Click on the magnifying glass next to the item type field.

- In the Lookup Item Type search parameter screen use the Item Type field if you know the item type associated with the award.

  NOTE: If you do not know the item type number, use the Description field to search for the item type associated with the Departmental Award. You do not have to enter the entire name of the award. The first few characters should suffice.

- Click Lookup. This should limit the item types returned in the search results section to only include item types in the predefined range.

- Select the item type that matches the departmental award by clicking on the item type or the corresponding description.

- If you do not see the item type associated with the award please contact SFA.
Step Seven

- Click in the Offered field and enter the amount of the award to be offered.
- Click in the Accepted field and enter the same amount entered in the Offered field.
- Click in the Disbursement plan field (disb plan) and select OA - Other Aid (FSU).
- The Split Code will determine which terms the amount you’re awarding gets applied to.
  - Unless the student is only eligible for one term of an award, you should select the Fall-Spring option. This will result in less data entry for you, better ability for the student to plan, and less confusion on the student’s award as the year goes on. Funds for future terms will not post unless the student is enrolled.
  - The split code is based on the disb plan selected. Below are the available values based on the OA disb plan. Update the Split Code by clicking on the magnifying glass next to the Split code field.
    - Disb Plan: OA - Other Aid (FSU)
      - Split Code: AY – All Year (Fall-Spring-Summer)
      - Split Code: FO - Fall Only
      - Split Code: FU – Fall Summer
      - Split Code: SF – Fall Spring
      - Split Code: SO - Spring Only
      - Split Code: SU - Spring Summer
      - Split Code: UO - Summer Only

Step Eight

- Award Validation completed successfully. Please review each award message. (14420.57)
- The award amount may have been adjusted as a result of the Validation process.
- Click on the **Validate** button. A message will appear stating the awards were validated successfully.

- Click **OK**. If you receive an error message please contact the Financial Aid office.

**Step Nine**

![Catalyst Award Distribution Screen](image)

- Notice how the award has a new number associated with it in the left most column. This number determines where in the hierarchy of awards Catalyst places the award. **DO NOT ADJUST THIS NUMBER.** It is designed to place the item type in the appropriate place to maintain compliance with federal and institutional awarding rules.

- Based on the amount the other awards displayed may change in value. Catalyst is designed to first reduce the aid sources that are least beneficial to the student. SFA will be doing frequent reviews of college awards to ensure that the automated adjustments made by the validation were done appropriately and in the best interest of the student.

- Click on the plus sign on the last row to add another award. If no other awards need to be entered click the Save button at the bottom of the page.

- If you are unsatisfied with the results or make an error, you can click “Reset” and the award will be reset to the amounts awarded before you began awarding.

**Step Ten**

- When you add an award, Catalyst will automatically distribute it evenly over the terms in the split code you’ve chosen. After validating the award you can change the distribution of the
award by clicking on the “Disbursement” link corresponding to the award you would like to split unevenly. The Award Disbursement Split Page will load.

- If you do not plan on splitting any awards unevenly proceed to Step Eleven.

**Award Disbursement/Split**

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Item Type</th>
<th>Net Award Amount</th>
<th>Disbursement Plan</th>
<th>*Split Code:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>840300040244</td>
<td>$5,000.00</td>
<td>OA</td>
<td>FS</td>
</tr>
</tbody>
</table>

**Award Disbursement/Split**

<table>
<thead>
<tr>
<th>Split Code:</th>
<th>OA</th>
</tr>
</thead>
</table>

- Check the box next to the Custom Split label.

**Award Disbursement/Split**

<table>
<thead>
<tr>
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<th>Net Award Amount</th>
<th>Disbursement Plan</th>
<th>*Split Code:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>840300040244</td>
<td>$5,000.00</td>
<td>OA</td>
<td>XX</td>
</tr>
</tbody>
</table>

- This will change the split code to XX and make the offered amounts editable.

- Enter the amounts associated with each term.

- Click OK.
Step Eleven

- Click the Post button. A message will appear stating the awards were posted successfully.
  - If you receive an error message please contact the Financial Aid Office. This step actually adds the award(s) to the student’s award package for the student to view and makes it available for the authorization and disbursement processes needed to post it to the student’s account.

- Click the OK button. The Manual Student Packaging tab should load.

- If you have any questions about assigning departmental awards, please contact the Financial Aid Office.

**IMPORTANT MESSAGE:**

When processing a scholarship in Catalyst, you may get the following message:

![Message](message.png)

Note that fund item types beginning with “8888” are estimates and many of your funding sources have been set up to replace estimates that were previously provided to the Student Financial Aid Office.

**Therefore, please click YES when presented with an auto cancel for an “8888…” item type.**

If you have any questions about this process or feel you may have hit “no” when presented with this box in the past, please contact Les Tacy in the Student Financial Aid Office at tacyli@ucmail.uc.edu.

You have now completed the steps for Entering Departmental Awards.