



# Maintaining Award Items

## Overview

This quick reference guide will cover how Financial Aid staff are able to create, copy, or maintain Financial Aid Student Award Items in Workday.

### Process: Creating a Student Award Item

1. After logging into Workday run **Create Student Award Item**.
2. Under **Details** you must select the effective date of the award item, name the award item, and assign it to an academic unit.

**Create Student Award Item**

**Details**

Note: The following fields are effective dated: Name, Description, Inactive.

Effective Date \* MM/DD/YYYY [calendar icon]

Name \* [text input]

Academic Unit \* [dropdown menu]

Academic Level [dropdown menu]

Description [text input]

Inactive

3. **Award Information** requires the award item type (Scholarship, Grant, etc.), whether the new award item is disburseable, as well as the source (Federal, Institutional, etc.). Federal and State Program IDs and IPEDS Categories may be designated here if applicable.

**Award Information**

Note: The following fields are effective dated: Disburseable, State Program ID, Code, IPEDS Category.

Type \* [dropdown menu]

Disburseable

Source \* [dropdown menu]

Federal Program ID [text input]

State Program ID [text input]

Code [text input]

IPEDS Category [dropdown menu]

Currency USD

4. The **Packaging** tab requires the Need Method to be designated. This tab also allows the user to designate packaging parameters such as Initial Award Status or associated Action Items.

**Packaging**

Note: All fields on this tab are effective dated.

Package Once

No Rounding

Lock Disbursements

Award Sort [dropdown menu]

Initial Award Status [dropdown menu]

Action Items [dropdown menu]

**Packaging**

Need Method \* [dropdown menu]

Student Allowable Action [dropdown menu]

5. The **Calculations** tab is where any Eligibility or Amount calculations are selected (or built).



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- The **Disbursement** tab houses all disbursement-related parameters, including Payment Precedence Groups, Disbursement Schedule Rules, and 1098-T Impact for the new award item.

- The **Work Study** tab allows Work Study parameters to be selected when the award item type is "Work Study" (Award Information, 1.b.)

- The **Accounting** tab allows selection of appropriate worktags for the new award item and whether they are required on the transaction.

Worktag Type	Allowed Worktags	Default Required	Default Worktag	Required on Transaction
Financial Aid Funding Designation		<input checked="" type="checkbox"/>		<input type="checkbox"/>
Activity		<input type="checkbox"/>		<input type="checkbox"/>
Cost Center		<input type="checkbox"/>		<input checked="" type="checkbox"/>
Fund		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Program		<input type="checkbox"/>		<input checked="" type="checkbox"/>
Funding Resource		<input type="checkbox"/>		<input type="checkbox"/>



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## Process: Copying a Student Award Item

1. After logging into Workday run **Copy Student Award Item**. Select the target **Student Award** to be copied as well as **Effective Date Definition** then press **OK**.

A screenshot of a dialog box titled "Copy Student Award Item". It contains two required fields: "Student Award" and "Effective Date Definition", both marked with a red asterisk. Each field has a dropdown menu icon on the right. At the bottom, there are two buttons: "OK" (orange) and "Cancel" (white with a grey border).

2. You will now be taken to the Edit Student Award screen with the values from the target student award prepopulated. For further information on this screen please see "Creating a Student Award Item" above.

## Process: Maintaining a Student Award Item

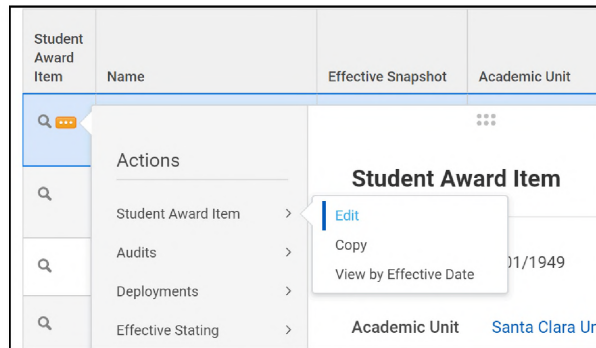
1. After logging into Workday run the **Find Student Award Items** task.
2. Parameters may be given to fine tune results, but are not necessary. Clicking **OK** will provide the full list of Student Award Items.

A screenshot of a dialog box titled "Find Student Award Items". It contains several search criteria fields: "Effective Date" (with a date picker showing 02/27/2023), "Academic Unit", "Academic Level", "Student Award Name", "Type", and "Source". Each field has a dropdown menu icon on the right. At the bottom, there are two buttons: "OK" (orange) and "Cancel" (white with a grey border).

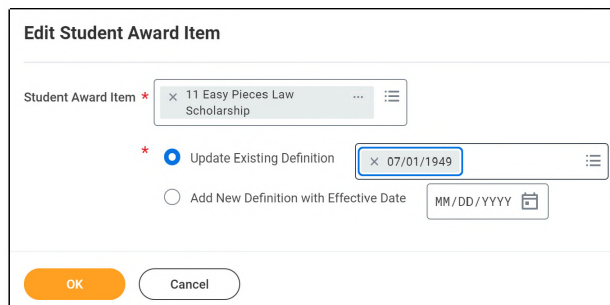


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3. Locate the desired award item in the list and edit/maintain it using **Related Actions** next to the magnifying glass in the Student Award Item column and selecting **Student Award Item > Edit**.



4. Select **Update Existing Definition** and find the definition date in the adjacent field, then press “OK”.



5. Refer to “Creating a Student Award Item” above for parameters found on the student award item screen.