



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

Name *

Academic Unit *

Academic Level

Description

Inactive

3. **Award Information** requires the award item type (Scholarship, Grant, etc.), whether the new award item is disbursable, 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: Disbursable, State Program ID, Code, IPEDS Category.

Type *

Disbursable

Source *

Federal Program ID

State Program ID

Code

IPEDS Category

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 Calculations Disbursement Work-Study Accounting

Packaging

Note All fields on this tab are effective dated.

Package Once

No Rounding

Lock Disbursements

Award Sort

Initial Award Status

Action Items

Packaging

Need Method *

Student Allowable Action

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



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Calculations

Note: The following fields are effective dated: Calculation, Interim Calculation, Frequency, Fiscal Limit, Individual Award Limits.

Eligibility

Calculation
 Interim Calculation
 None of the above

Amount

Calculation
 Interim Calculation
 None of the above

Limits

Fiscal Limit

Individual Award Limits

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

Disbursement

Note: The following fields are effective dated: Disbursement. You can't update the refundable field for an award item.

Payment Precedence Group *

Disbursement Eligibility Conditions

Disbursement Schedule Rule

Disbursement Proration Rule

Refundable

1098-T Impact *

Anticipated Payment

Anticipated Payment Display Rule

Disbursement

Disbursement Eligibility Calculation

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

Work-Study

Note: All fields on this tab are effective dated.

Work-Study Payment Conditions

Work-Study Allocation Set *

Payment Limit *

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

Accounting

Note: No fields on this tab are effective dated.

Spend Category

Related Worktags

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**.

Copy Student Award Item

Student Award *

Effective Date Definition *

OK Cancel

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.

Find Student Award Items

Effective Date 02/27/2023

Academic Unit

Academic Level

Student Award Name

Type

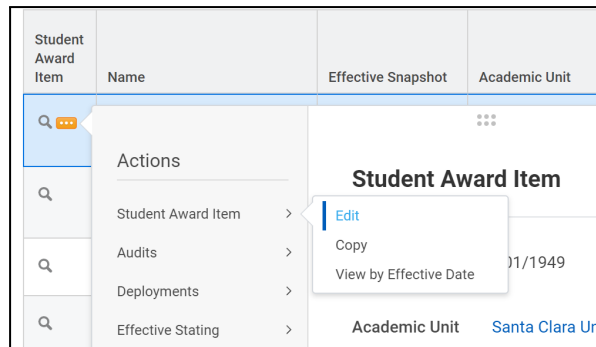
Source

OK Cancel

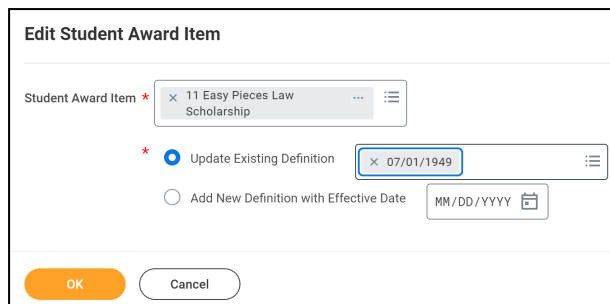


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3. Locate the desired award item in the list and edit/maintain it using **Related Actions** next to the magnifying glass in the Student Award Item column and selecting **Student Award Item > Edit**.



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.