OSU Scholarship System—How to add a new Scholarship Plan

1) Login and locate the Foundation System page.

2) From the left hand side, hover over Scholarship Plan and select Manage Scholarship Plan.

3) Enter the Scholarship Name, Detail Code or Index, if known. Otherwise enter a percent sign (%) in one of the three boxes and click search. This search will populate the entire list of scholarships you manage.

4) From the list, select the scholarship for which you want to build a new plan. There are three columns with fiscal years—Prior, Current and Future. Select by clicking on the icon in the column for the year of the plan.

3) The icons identify the type of action permitted. For this example, the Create Icon is displayed.
5) The OSU Scholarship Payment Authorization Window opens.

![OSU Scholarship Payment Authorization Window]

6) In the Foundation Account section, enter a valid Project ID. If the Project ID box is set to gray (like the Title box below), you cannot change it for the fiscal year. If the Project ID box is open (as demonstrated below), you will need to enter a valid Project ID.

**NOTE:** Contact the OSU Foundation for Project ID if unknown.

![Foundation Account]

7) Next in Authorization Information section, select a signer from the drop down box.

![Authorization Information]

8) From Requirements, select the enrollment level from the drop down list. The default value is FULL.

![Requirements]

9) There are two ways to enter the scholarship award recipient information, individual manual entry or spreadsheet entry.

![Recipient Information]
Manual Entry of Scholarship Award Recipient Information

- Enter the OSU ID number for award recipient and click Lookup. If the OSU ID is valid, the name will appear in the Full Name box. Click Add.
- The recipient information appears in a table. Enter the award amount for each of the four terms.

<table>
<thead>
<tr>
<th>ID #</th>
<th>Full Name</th>
<th>Summer 2012</th>
<th>Fall 2012</th>
<th>Winter 2013</th>
<th>Spring 2013</th>
<th>Total Award For Year</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
</tr>
</tbody>
</table>

TOTAL: $ 0.00 $ 0.00 $ 0.00 $ 0.00 $ 0.00

- Repeat this process for each additional award recipient.

Spreadsheet Entry of Scholarship Award Recipient Information

- Click on the spreadsheet icon located in the lower right hand side of the window. The following window will display.

A special Excel template is required for this spreadsheet entry. A Template link is provided in the window. You can use this template directly or cut and paste the required information from your own spreadsheet. The Scholarship Import Spreadsheet window opens.
Below is a sample of the Scholarship Import Spreadsheet.

Next locate the scholarship recipient spreadsheet you want to import. Click Upload.

If errors appear in the spreadsheet, they will need to be corrected before trying to upload again.

If the spreadsheet is free of errors, it will import into the scholarship form.

10) After the award Recipient Information is complete, you have the option of adding a note in the available box.

11) Click the PreValidate button to validate the recipient(s) against the current Banner scholarship rules. This step is optional.

12) Click Next.

13) A confirmation page appears. Review your information for accuracy. If correct, click the SUBMIT button to forward the new scholarship plan to the signer.

Additional Information and Helpful Hints:

- Once a Scholarship Plan has been authorized, the Project ID used will be assigned to the Detail Code for that fiscal year. In order to change the Project ID, a new Detail Code must be requested.

- A SAVE button may appear on the confirmation page for a newly created Scholarship Plan. This option allows the Scholarship Plan to be saved in DRAFT status, permitting revisions to the plan prior to authorization. The Scholarship Plan is sent to the signer only after you click SUBMIT.

- A red X appears next to a recipient’s name for easy removal from the Scholarship Plan. If the red X does not appear, the award was previously registered in Banner and cannot be removed. In this case, you will need to zero the award amount(s) in order to reverse payment and re-submit for approval.

NOTE: Annual award total in spreadsheet only. A Banner process allocates the total across the terms.