Scholarship Award Memo Workshop
Presenter: Joshua Menefee

jjmenefee@central.uh.edu
(832) 842-3729
Agenda

• Introduction
• Going Green
• Types of Memos
• Recipient Information
• Department/Division Information
• Criteria Information
• Contact Information & Signatures
• Fee Waivers
• Adjustments
• Responsibility of Preparers & SFA
• Timeline
Introduction

Scholarship Award Memos are used by departments and divisions on campus to identify to the Office of Scholarships and Financial Aid (SFA) their scholarship recipients and criteria.
Going Green

The Office of Scholarships & Financial Aid is moving the award memos into a paperless process for FY 14.
Going Green

All initial awards and adjustments memos will be sent to our SharePoint email address as an attachment.

SFASAMemo@share.uh.edu
Going Green

• All attachments must have a unique name and cannot contain any spaces.
  • Ex: Shasta_Bucks_1.25.13

• The subject of the email should be the name of your department.

SFASAMemo@share.uh.edu
TYPES OF MEMOS

• Single Award Memo
  – For a scholarship given to a single student

• Multiple Award Memo
  – Awarding the same scholarship to multiple students
Recipient Information
(Section 1, 2, & 3A)

• Student name and MyUH ID# must match
• Amount of scholarship
• Term awarded
Model

<table>
<thead>
<tr>
<th>Terms</th>
<th>Year</th>
<th>A. INITIAL AWARD</th>
<th>B. ADJUSTMENTS to Initial Award</th>
<th>REVISED TOTAL AWARD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>2012</td>
<td>$500.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>and/or</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spring</td>
<td>2013</td>
<td>$500.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OR</td>
<td></td>
<td></td>
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<tr>
<td>Summer I, II, III and/or</td>
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</tr>
<tr>
<td>Summer IV</td>
<td></td>
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</tr>
</tbody>
</table>

Total Amount: $1,000.00

Total Scholarship Amount: $1,000.00

Memo Creation Date and Time
7-Jun-12 08:46 AM

Steve Urkel
Department/Division Information
(Section 4-7)

• PeopleSoft Cost Center
  - Identifies the account from which the funds will be withdrawn
  - Please make sure your cost center is set up with the appropriate account code (B5067 – Scholarships and Fellowship). Although we will be reviewing the cost center program code, certifying the award memo denotes the approval to award.

• PeopleSoft Cost Center title and Scholarship name
  - These can be different

• Identify the Department/Division awarding the scholarship
## Model

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4. <strong>PeopleSoft Cost Center #:</strong></td>
<td>00730-4027-H0213-H2559</td>
</tr>
<tr>
<td>5. <strong>PeopleSoft Cost Center Title:</strong></td>
<td>Shasta Bucks</td>
</tr>
<tr>
<td>6. <strong>Scholarship Name:</strong></td>
<td>The Pride</td>
</tr>
<tr>
<td>7. <strong>Department/Division:</strong></td>
<td>Financial Aid</td>
</tr>
</tbody>
</table>
Criteria Information (Section 8, 9, & 11)

- Criteria Request form **MUST** be attached to first time scholarships
- New scholarship
- Minimum hours required
- Minimum GPA required
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Is this a new scholarship?</td>
</tr>
<tr>
<td>9.</td>
<td>Minimum Hours Required:</td>
</tr>
<tr>
<td>11.</td>
<td>Minimum GPA Required:</td>
</tr>
</tbody>
</table>
REQUEST FOR REVIEW OF COLLEGE ADMINISTERED SCHOLARSHIP CRITERIA PER MAPP 12.01.01

REQUESTING COLLEGE:

Date: 

Scholarship Name: 

Fund Source: (example: 4028, check from donor)

Amount to be awarded per year: 

Who selects the recipients for scholarship? Faculty Committee □ Staff Committee □ Other □

Please attach list of members of committee (if applicable) or description of method used to select recipients.

Is scholarship a one-time scholarship?  YES □ NO □

Is this a recurring/continuing scholarship: YES □ NO □

Where is Scholarship publicized? College Website □ Via College Listserv □ Other □

Select whichever applies:

□ Academically Competitive Scholarship (requires min. GPA or minimum scores on Standardized Exam)
□ Leadership Criteria (student submits resume or essay)
□ Neither Apply

Will there be an out of state tuition waiver request for scholarship?  YES □ NO □

Is scholarship offered to Texas Residents and non-residents? YES □ NO □

Description of Scholarship Criteria:
Section 10

Our office needs to know the career of the student awarded. This will assist with our Item Type set-up
<table>
<thead>
<tr>
<th>Career:</th>
<th>Undergraduate</th>
<th>Pharmacy</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Graduate</td>
<td>Optometry</td>
</tr>
<tr>
<td></td>
<td>x</td>
<td>Law</td>
</tr>
</tbody>
</table>
Scholarship Committee (Section 12)

- Only scholarships that offer a competitive scholarship waiver need to be awarded by a University of Houston recognized committee.
Contact Information & Signatures (Section 13-14)

- Completion notification will be emailed to each department
- Preparer signature & certifying signature
  - Need both to be processed
  - Cannot be the same person
Model

<table>
<thead>
<tr>
<th>Contact Name:</th>
<th>Joshua Menefee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address:</td>
<td><a href="mailto:jjmenefe@central.uh.edu">jjmenefe@central.uh.edu</a></td>
</tr>
<tr>
<td>Extension:</td>
<td>23729</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Preparer Signature:</th>
<th>Joshua Menefee</th>
<th>Date signed:</th>
<th>6/7/2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certifying Signature:</td>
<td>Shari Corprew</td>
<td>Date signed:</td>
<td>6/7/2014</td>
</tr>
</tbody>
</table>

[www.uh.edu/financialaid](http://www.uh.edu/financialaid)
Multiple Award Memo

• Requires the same information as the single award memo.
  • The awarded amount will be the combined total of all students listed.
• The multiple award roster must have the student’s name, PS ID #, amount awarded, and the term awarded.
  • Each student does not have to be awarded the same amount.
# Model

<table>
<thead>
<tr>
<th>Scholarship Name:</th>
<th>Shasta Bucks</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Term</strong></td>
<td><strong>Year</strong></td>
</tr>
<tr>
<td>Fall 2013</td>
<td></td>
</tr>
<tr>
<td><strong>Student Name (Last Name, First Name)</strong></td>
<td><strong>PS ID #</strong></td>
</tr>
<tr>
<td>Urkel, Steve</td>
<td>1234567</td>
</tr>
<tr>
<td>Bond, James</td>
<td>7654321</td>
</tr>
<tr>
<td>Menefee, Joshua</td>
<td>1234566</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>$2,500.00</strong></td>
</tr>
<tr>
<td><strong>Grand Total:</strong></td>
<td><strong>$5,000.00</strong></td>
</tr>
</tbody>
</table>
Academic Competitive Scholarship Waiver

• Waives non-resident fees
  - Available to non-residents only

• Scholarship MUST meet all criteria as determined by the Texas Administrative Code
UNIVERSITY of HOUSTON
OFFICE OF SCHOLARSHIPS & FINANCIAL AID

Certification of an Academic Competitive Scholarship Waiver
(In-State Tuition Waiver)

CERTIFICATION
The student, whose name is ____________________________________________________________
Last First Middle
FS ID # ____________________________________________________________ has been awarded an academic competitive scholarship(s)
with the name(s) of ____________________________________________________________ for the amount(s) of ____________ for one of the following periods...

☐ Fall & Spring terms, years ____________
☐ Fall term, year ____________
☐ Spring term, year ____________
☐ Summer 1 & 2 terms, year ____________ (I, II, III, IV)
☐ Summer 1, year ____________ (II, III)
☐ Summer 2 term, year ____________ (IV)

ELIGIBILITY:
The certifier of this nonresident tuition fee waiver must initial the 5 statements below acknowledging the eligibility criteria of the scholarship award(s) based on the statutes detailed in the Texas Administrative Code - Title 19, Part 1, Ch. 21, Subchapter B, Rule 21.29(4).

☐ Award total is at least $1,000 for the period of time covered by the scholarship(s) not to exceed 12 months.
☐ Scholarship(s) is awarded by a committee authorized in writing by UH administration to grants scholarships that permit this waiver of nonresident tuition.
☐ Scholarship application(s) was made available to the public
☐ Awards are permitted to both resident and nonresident persons.
☐ Scholarship funds and selection processes are under the control of the University of Houston.

College/Division and Department Name ________________________________________________
Prepared By __________________________________________ Date _________________________

Certifying Signature (Print and Sign) ________________________________________________ Date _________________________

Contact Phone Number _____________________________________________________________
Adjustments (Section 3B)

- Adjustment section of memo needs to be completed for any change after an initial award
- Adjustments can be made on Single or Multiple Award memos
- Only students whose awards are being adjusted need to be included on a multiple memo
  - Original award memo is not needed
### Model

**Memo Creation Date and Time**
- 3-Nov-11 03:00 PM

#### 3. Amount to be received...

<table>
<thead>
<tr>
<th>Terms</th>
<th>Year</th>
<th>A. INITIAL AWARD</th>
<th>B. ADJUSTMENTS to Initial Award</th>
<th>REVISED TOTAL AWARD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>2011</td>
<td>$500.00</td>
<td>$300.00</td>
<td>$800.00</td>
</tr>
<tr>
<td>and/or</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Spring</td>
<td>2012</td>
<td>$500.00</td>
<td></td>
<td></td>
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<tr>
<td>OR</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summer I, II, III and/or</td>
<td></td>
<td></td>
<td>Total Scholarship Amount:</td>
<td>$1,300.00</td>
</tr>
<tr>
<td>Summer IV</td>
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</tr>
</tbody>
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**Total Amount:** $1,000.00

**Explanation:** Student
Separation of Duties

• Department/Division
  - Determine eligibility
  - Decide amount to be offered
  - Select students to award
  - Reconcile accounts after disbursement

• SFA
  - Post to student account and disburse
  - Email department of award memo completion
The typical time frame for completing the entire process is one week:

- This is counted from the time the award memo is received until the completion email is sent.
- During peak season our processing timeframe increases to two weeks.
- We will begin to process memos for the 13-14 school year in February.
- We will send an email notification to preparers to inform departments when we will begin to process memos or if processing time frames have changed.
Important Dates
Fall 2013

• Payment Due – August 19
• Scholarship award memos MUST be received by August 2nd to ensure the award will be posted by the payment deadline, August 19.
**UNIVERSITY of HOUSTON**
OFFICE OF SCHOLARSHIPS & FINANCIAL AID

**SCHOLARSHIP AWARD MEMO (Single)**

1. **PeopleSoft ID:** 7654321
2. **Name:** Steve Urkel

**Memo Creation Date and Time**
7-Jun-12 09:24 AM

3. **Amount to be received...**

<table>
<thead>
<tr>
<th>Terms</th>
<th>Year</th>
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<tbody>
<tr>
<td>Fall 2012</td>
<td></td>
<td>$500.00</td>
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<td>$500.00</td>
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<tr>
<td>Spring 2013</td>
<td></td>
<td>$500.00</td>
<td></td>
<td>$500.00</td>
</tr>
<tr>
<td>OR Summer I, II, III</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Summer IV</td>
<td></td>
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</tr>
</tbody>
</table>

   **Total Amount:** $1,000.00

4. **PeopleSoft Cost Center #:** 00730-4027-H0213-H2559
5. **PeopleSoft Cost Center Title:** Shasta Bucks
6. **Scholarship Name:** The Pride
7. **Department/Division:** Financial Aid
   **Contact Name:** Joshua Menefee
   **Email Address:**
8. **Is this a new scholarship?** Yes
9. **Minimum Hours Required:** 12
10. **Career:** Undergraduate
    **Extension:** Optometry
11. **Minimum GPA Required:** 2.5
12. **Does a committee award this scholarship?**
13. **Preparer Signature:** Joshua Menefee
    **Date signed:** 6/7/2014
14. **Certifying Signature:** Shari Corprew
    **Date signed:** 6/7/2014
Questions?