

Example #2

Non-Student

Begin by typing SS1 in the Command line:

```
>> Select a document or a new action and press enter to continue <<
*DEFINE      SCHOLARSHIP/FELLOWSHIP AWARD DOCUMENT - SS1      Year 05 06
Command: SS1      Misc: _____      Account: _____
=====
Status:          -- COVER SHEET --      Document ID: _____
Action:  ___      Summary: _____
Created:  /  /
Sections:  _ 1. Compliance Questions
           _ 2. Student and Account Information
           _ 3. Address Selection/Check Routing
           _ 4. Payment Schedule
           _ 5. Award Comments (Optional)
           _ 6. Department Codes (Optional)      Route to Scholarship _
-----
Account Nbr.:  -  -      EID:
Award Title :      Name:
Award Amount:      School:      Major:      Class:
Award Status:
Next Payment:      YYS: 000 Hours:      Student:
                   US Citizen:
SFS Status:      SFS Counselor:      Fee Bill Status:
-- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 9/01/05 11:20 AM --
```

Cover Sheet

Create a SS1 by typing 'NEW' in the Action field and a descriptive summary:

```
>> Please enter the Document Summary <<
*DEFINE          SCHOLARSHIP/FELLOWSHIP AWARD DOCUMENT - SS1          Year 05 06
Command: SS1          Misc: _____ Account: _____
=====
Status: _____ - COVER SHEET --          Document ID: _____
Action: NEW Summary: _____
Created:   /   /

Sections:   _ 1. Compliance Questions
            _ 2. Student and Account Information
            _ 3. Address Selection/Check Routing
            _ 4. Payment Schedule
            _ 5. Award Comments (Optional)
            _ 6. Department Codes (Optional)          Route to Scholarship _
-----
Account Nbr.: - -          EID:
Award Title :          Name:
Award Amount:          School:          Major:          Class:
Award Status:
Next Payment:          YYS: 000 Hours:          Student:
                   US Citizen:
SFS Status:   SFS Counselor:   Fee Bill Status:

-- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 9/01/05 11:38 AM --
```

Document Created – Select Sections

When Enter is pressed, *DEFINE will give a successful creation message and a document ID. Type an 'X' next to all sections to complete document. By marking all sections, *DEFINE will advance automatically through each section.

```
>> Creation of Document R0SS1991994 successfully completed; continue <<
*DEFINE          SCHOLARSHIP/FELLOWSHIP AWARD DOCUMENT - SS1          Year 05 06
Command: SS1          Misc: _____ Account: _____
=====
Status: CREATED          -- COVER SHEET --          Document ID: R0SS1991994
Action: ___ Summary: VISTING SCHOLAR_____
Created: 08/03/05      ACSAH  HALL, STEPHANIE A

Sections:
  x 1. Compliance Questions
  x 2. Student and Account Information
  x 3. Address Selection/Check Routing
  x 4. Payment Schedule
  x 5. Award Comments (Optional)
  x 6. Department Codes (Optional)          Route to Scholarship _

-----
Account Nbr.: - - -          EID:
Award Title :          Name:
Award Amount:          School:          Major:          Class:
Award Status: Offered
Next Payment:          YYS: 000 Hours:          Student:
          US Citizen:
SFS Status: SFS Counselor:          Fee Bill Status:

-- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 9/01/05 11:47 AM --
```


Section 1 – Compliance Questions

Press Enter and the remaining compliance questions will be displayed. Answer the questions based on the specifics of your payment, all 6 must be answered to continue.

```
+-----+
| >> Please enter your Updates or a Document Action. <<
| Action:  ___ Compliance Questions Section 1 of 5
| Document ID:  ROSS1991994 - VISITNG SCHOLAR
|-----+
| 1. During the period of this award, will the recipient be appointed as a
| (choose all that apply):  _ TA      _ AI      _ RA      X none
|
| 2. Must the recipient perform any of the following services in exchange
| for this award (Y or N)? _
| *Research      *Teaching      *Grading
| *Web Development *Facilitating/Organizing an event *ANY OTHER SERVICE
|
| 3. Is this a reimbursement for official university business (Y or N)? _
| 4. Is this award for travel (Y or N)? _
| If Yes, is the recipient required to be a registered student? (Y or N) _
| Travel code for Destination: _____
| and Purpose:  ___
|
| 5. If the recipient is a student, does the student have to be
| registered full time (Y or N)? _
| 6. This award is based on (choose at least one):
| _ Financial need  _ Academic merit  _ Other _____
|-----+
|-- 0 UT Austin  ----- PF1=Options  ----- PF8=Exit  ----- 9/01/05 12:04 PM --
```

Section 1 – Compliance Questions

Press Enter to update.

Please note: question #5 should always be marked 'N' for non-students. Also: if question #6 is marked as 'Other' the document will be forced to route to the Scholarship Desk for approval.

```
+-----+
| >> Record was successfully updated. <<
| Action:   ___ Compliance Questions           Section 1 of 5
| Document ID: R0SS1991994 - VISITING SCHOLAR
|-----+
| 1. During the period of this award, will the recipient be appointed as a
|    (choose all that apply):   _ TA      _ AI      _ RA      X none
|
| 2. Must the recipient perform any of the following services in exchange
|    for this award (Y or N)? N
|    *Research           *Teaching           *Grading
|    *Web Development   *Facilitating/Organizing an event *ANY OTHER SERVICE
|
| 3. Is this a reimbursement for official university business (Y or N)? N
| 4. Is this award for travel (Y or N)? N
|    If Yes, is the recipient required to be a registered student? (Y or N) _
|    Travel code for Destination: _____
|                                and Purpose:  ___
|
| 5. If the recipient is a student, does the student have to be
|    registered full time (Y or N)? N
|
| 6. This award is based on (choose at least one):
|    X Financial need   _ Academic merit   _ Other _____
|-----+
| -- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 9/01/05 01:32 PM --
```

Section 2 – Student and account information

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Press Enter again, *DEFINE will advance to Section 2. Enter the recipient's EID or SSN and press Enter. The recipient's name should automatically fill in if already on the vendor file. Complete Section 2 by entering the award amount and account number.

```
>> Please enter your Updates or a Document Action. <<
Action:   ___ Student and Account Information Section 2 of 5
Document ID: ROSS1991994 - VISITING SCHOLAR
-----
ID:      _____ Awardee is a UT Employee:
Name:    First      Middle      Last      Suffix
        _____
Total Award Amount: _____
Award Amount by Semester:
                Fall   ( _ ) _____
                Spring ( _ ) _____
                Summer ( _ ) _____
Offer Expiration Date (MMDDYY): _____
Account Number: _____ + Related Account:
Account Title:
Award Title:    Fellowship/Scholarship Award_____
                _____
                _____
Special Purpose: _   Travel N   Academic Competitive (Y/N): N
```

```
-- 0 UT Austin ----- PF1=Options ----- PF8=Exit ----- 09/01/05 01:39 PM --
```


Section 2 – Student and account information

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The newly created EID will be displayed instead of the SSN in the ID field. After all information has been typed in, press Enter and *DEFINE will display a successfully updated message at the top of the screen. Complete Section 2 by entering the award amount and account number. Press Enter again to advance. *Please note: Award Amount by Semester will be filled in automatically after completing the payment schedule.*

```
+-----+
| >> Record was successfully updated. <<
| Action:   ___      Student and Account Information      Section 2  of 5
| Document ID:  R0SS1991994 - SCHOLAR VISITNG
|-----+
| ID:   SS1234___ +      Awardee is a UT Employee:  N
| Name:      First      Middle      Last      Suffix
|           Steven_____      Scholar_____
|
| Total Award Amount:      1000000.00 +
|
| Award Amount by Semester:
|                   Fall   ( _ ) _____
|                   Spring ( _ ) _____
|                   Summer ( _ ) _____
| Offer Expiration Date (MMDDYY): _____
| Account Number:      3000002470 + Related Account:
| Account Title:      Various Donors-Variou Purposes
| Award Title:      Various Donors-Variou Purposes_____
|                   _____
|                   _____
| Special Purpose:  _      Travel N      Academic Competitive (Y/N):  N
|-----+
| -- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 9/01/05 12:26 PM --
```

Section 2 – Student and account information

When Enter is pressed again, *DEFINE will display a GGS (similar to the GGV document) screen to add a vendor record so the payment address information can be established. Type 'NEW' in the action field. This is for recipients who do not already have address information on the vendor file.

```
>> Select a document or a new ACTION and press ENTER to continue <<
Status: _____ Document ID: _____
Action: NEW Summary: 050901 DEPT VENDOR ID REQUEST_____
Created: 09/01/05 by ACSAH -
```

VENDOR INFORMATION

```
Vendor ID: 23456789129
Vendor Primary Name: Scholar, Steven
Other Name: _____
Non-Post Office Info: _____
Postal Address: _____
City: _____ State: __ Zip: _____
Phone: _____ Fax: _____ Country Code: __
```

Note: SS1 cannot be approved by creator until GGS is approved by the Scholarship desk. Send Non-Student Eligibility Verification form and required supporting documents to the Scholarship Desk in the Office of Accounting, please reference pending GGS document ID.

Section 2 – Student and account information

The status will now change to **CREATED** and a document ID will be assigned. Type the recipient's address in appropriate fields.

```
>> Creation of document R0GGS999813 successfully completed; continue <<  
Status: CREATED Document ID: R0GGS999813
```

```
Action: ___ Summary: 050901 DEPT VENDOR ID REQUEST_____
```

```
Created: 09/01/05 by ACSAH - HALL, STEPHANIE A
```

VENDOR INFORMATION

```
Vendor ID: 23456789129
```

```
Vendor Primary Name: Scholar, Steven
```

```
Other Name: _____
```

```
Non-Post Office Info: _____
```

```
Postal Address: _____
```

```
City: _____ State: __ Zip: _____
```

```
Phone: _____ Fax: _____ Country Code: __
```

Note: SS1 cannot be approved by creator until GGS is approved by the Scholarship desk. Send Non-Student Eligibility Verification form and required supporting documents to the Scholarship Desk in the Office of Accounting, please reference pending GGS document ID.

Section 2 – Student and account information

In this example, our recipient is a citizen of England, and the vendor information is entered with a foreign address. This foreign address format is the same format required in the GGV command. Press Enter after all information has been entered.

```
>> Update to document R0GGS999813 successfully completed; continue <<
Status: CREATED                               Document ID: R0GGS999813
Action:   ___ Summary: 050901 DEPT VENDOR ID REQUEST_____
Created: 09/01/05 by ACSAH - HALL, STEPHANIE A
```

VENDOR INFORMATION

```
Vendor ID: 23456789129
Vendor Primary Name: Scholar, Steven
Other Name: _____
Non-Post Office Info: 3 ABBEY ROAD_____
Postal Address: ST JOHNS WOOD, NW8 9AY_____
City: LONDON_____ State: -- Zip: _____
Phone: _____ Fax: _____ Country Code: UK
```

Note: SS1 cannot be approved by creator until GGS is approved by the Scholarship desk. Send Non-Student Eligibility Verification form and required supporting documents to the Scholarship Desk in the Office of Accounting, please reference pending GGS document ID.

Section 2 – Student and account information

Press Enter one more time to prompt the *DEFINE message:

>> Select a document or a new ACTION and press ENTER to continue <<

Type APP in the Action field to approve the document. Press Enter.

```
+-----+
| >> Select a document or a new ACTION and press ENTER to continue <<
| Status: CREATED                               Document ID: R0GGS999813
| Action: APP Summary: 050901 DEPT VENDOR ID REQUEST_____
| Created: 09/01/05 by ACSAH - HALL, STEPHANIE A
+-----+
```

VENDOR INFORMATION

```
Vendor ID: 23456789129
Vendor Primary Name: Scholar, Steven
Other Name: _____
Non-Post Office Info: 3 ABBEY ROAD_____
Postal Address: ST JOHNS WOOD, NW8 9AY_____
City: LONDON_____ State: -- Zip: _____
Phone: _____ Fax: _____ Country Code: UK
```

Note: SS1 cannot be approved by creator until GGS is approved by the Scholarship desk. Send Non-Student Eligibility Verification form and required supporting documents to the Scholarship Desk in the Office of Accounting, please reference pending GGS document ID.

Section 2 – Student and account information

***DEFINE** will generate a successful update message at the top of the screen.

```
+-----+
| >> Update to document R0GGS999813 successfully completed; continue <<
| Status: CREATED                               Document ID: R0GGS999813
| Action: APP Summary: 050901 DEPT VENDOR ID REQUEST_____
| Created: 09/01/05 by ACSAH - HALL, STEPHANIE A
```

VENDOR INFORMATION

```
Vendor ID: 23456789129
Vendor Primary Name: Scholar, Steven
Other Name: _____
Non-Post Office Info: 3 ABBEY ROAD_____
Postal Address: ST JOHNS WOOD, NW8 9AY_____

City: LONDON_____ State: -- Zip: _____
Phone: _____ Fax: _____ Country Code: UK
```

Note: SS1 cannot be approved by creator until GGS is approved by the Scholarship desk. Send Non-Student Eligibility Verification form and required supporting documents to the Scholarship Desk in the Office of Accounting, please reference pending GGS document ID.

Section 2 – Student and account information

Press Enter one more time and the status will change from **CREATED** to **PENDING**. The new GGS document is now waiting for approval on the Scholarship Desk. Press Enter again to advance to the address selection screen.

```
>> Document is now at desk GGS in AC - ACCOUNTS PAYABLE <<
Status: PENDING Document ID: R0GGS999813
Action: ____ Summary: 050901 DEPT VENDOR ID REQUEST_____
Created: 09/01/05 by ACSAH - HALL, STEPHANIE A
```

VENDOR INFORMATION

```
Vendor ID: 23456789129
Vendor Primary Name: Scholar, Steven
Other Name: _____
Non-Post Office Info: 3 ABBEY ROAD_____
Postal Address: ST JOHNS WOOD, NW8 9AY_____
City: LONDON_____ State: -- Zip: _____
Phone: _____ Fax: _____ Country Code: UK
```

Note: SS1 cannot be approved by creator until GGS is approved by the Scholarship desk. Send Non-Student Eligibility Verification form and required supporting documents to the Scholarship Desk in the Office of Accounting, please reference pending GGS document ID.

Section 2 – Student and account information

*DEFINE will generate a message: >>GGS vendor address: R0GGS999813 has been requested.<<
Verify the accuracy of the address information and note the GGS doc ID. Please send required documentation to the Scholarship Desk, K5300 (Non-student eligibility form with photo ID & SSN card). The SS1 cannot be approved until the GGS has been approved by the Scholarship Desk. Press Enter to advance to the next section.

```
+-----+
| >>GGS vendor address: R0GGS999813 has been requested.<<
| Action:  ____ Address Selection/Check Routing Section 3 of 5
|-----+
| VID: 2 SS1234 ____ Name: Scholar, Steven
```

```

| GGS      Addr Line 1: 3 ABBEY ROAD
|          Addr Line 2: ST JOHNS WOOD, NW8 9AY
|          City/St/Zip: LONDON --
|          Phone: ( 0 ) -
```

```

| Note: SS1 cannot be approved by creator until GGS is approved by the
| Scholarship desk. Send Non-Student Eligibility Verification form and
| required supporting documents to the Scholarship Desk in the Office of
| Accounting, please reference pending GGS document ID.
```

```

| Check Pick Up: _
|-----+
```

Section 4 – Payment Schedule

Schedule your payments. Payment dates and amounts can be entered manually or you may use the automatic scheduling feature. The 'Date' will be the check print date (mailing date) or the date the ACH is scheduled to go out to the payee's bank account (funds are available 2 business days later). You can use the 'St' and 'Hd' (hold) fields to prevent release of the funds.

```
+-----+
| >> Record was successfully updated <<
| Action:   ___      Payment Schedule                      Section 4  of 5
| Document ID: R0SS1991994  Award Amt: 1000000.00      Unpaid Bal:      0.00
|-----|
| To schedule payments, you may:
| 1.  Manually type in the payment schedule below (or)
| 2.  Use the automatic scheduling feature by typing an "X" here:  _
|-----|
|   St Hd   Payment Amt   Date Date Pd Mail   Address           City   St Zip
| 1)  _ _   1000000.00  090105
| 2)  _ _   _____   _____
| 3)  _ _   _____   _____
| 4)  _ _   _____   _____
| 5)  _ _   _____   _____
| 6)  _ _   _____   _____
| 7)  _ _   _____   _____
| 8)  _ _   _____   _____
| 9)  _ _   _____   _____
| 10)  _ _   _____   _____
| 11)  _ _   _____   _____
| 12)  _ _   _____   _____
|-----+
| -- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 9/01/05 05:38 PM --
```

Section 5 – Award Comments

Award comments are optional for departmental use and record. Press Enter to update and permanently store comments. Press Enter again, after all updates, to advance to the final section.

```
+-----+
| >> Record was successfully updated <<
| Action:   ___          Award Comments          Section 5  of 5
|          -----
| Document ID:      ROSS1991994
| Document Summary: VISITING SCHOLAR
| -----
| Steven was top of his class at Oxford. He will be a tremendous asset _____
| to our department. Added by: ACSAH 09/01/05_____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
+-----+
-- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 9/01/05 03:06 PM --
```

Section 6 – Departmental codes

Departmental Codes are also optional, and vary widely by department. Check with your supervisor to determine what information, if any, your department requires. Press Enter to update information, and again to advance back to the document coversheet.

```
+-----+
| >> Final page of departmental transactions <<
| Action: ____ DEPARTMENT CODES Section 06 of 06
| -----
| Transaction Date: 090105 Month: ____ Start at Account: _____
|                                     Audit Codes? N
| ACCT NBR  LEDGER DESCRIPTION      TYPE      AMOUNT  D/C
| CODE 1   CODE 2   CODE 3   CODE 4   CODE 5      CODE 6
| DTN     TAG A    TAG B    COMMENTS
| 1      3000002470  SCHOLAR, STEVEN      _____ EN      1000000.00 D
| _____
| -----+
|
| -----+
| -- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 9/01/05 05:47 PM --
```

Coversheet

The document will now show an 'X' next to all completed sections. The document will remain in 'Created' and 'Offered' status until approved. Type 'VER' in the Action field to verify the document before APProving the document..

```
>> Select a new action or mark a section to Update <<
*DEFINE          SCHOLARSHIP/FELLOWSHIP AWARD DOCUMENT - SS1          Year 05 06
Command: SS1          Misc: _____ Account: _____
=====
Status: CREATED          -- COVER SHEET --          Document ID: R0SS1991994
Action:  ___ Summary: VISITING SCHOLAR _____
Created: 09/01/05      ACSAH  HALL, STEPHANIE A

Sections: X _ 1. Compliance Questions
          X _ 2. Student and Account Information
          X _ 3. Address Selection/Check Routing
          X _ 4. Payment Schedule
          X _ 5. Award Comments (Optional)
          _ 6. Department Codes (Optional)          Route to Scholarship _
-----
Account Nbr.: 30-0000-2470 +          EID: SS1234 +
Award Title : Various Donors-Variou Purpos Name: SCHOLAR, STEVEN
Award Amount: $ 1000000.00 +          School: Major: Class:
Award Status: Offered
Next Payment: 090105          YYS: 059 Hours: Student: N
          US Citizen: Y
SFS Status: SFS Counselor: 00 Fee Bill Status: Status Unknown

-- 0 UT Austin ----- PF1=Options ----- PF8=Exit ----- 9/01/05 05:50 PM --
```

Coversheet

*DEFINE will display an error message. The document will not verify correct until the GGS has been approved by the Scholarship Desk. A Non-Student eligibility form, with required identification will be required before the Scholarship Desk will approve the document. Please send to K5300, Attention: Scholarship Desk

```
>> Press Enter to return to Document Cover Sheet <<
                VERification Audits NOT Passed
```

```
Document ID: R0SS1991994  Summary: VISITNGS SCHOLAR
Student ID: SS1234        Name: SCHOLAR, STEVEN
```

```
-----
Error Text                                     Section
1. The GGS document must be approved before the SS1 can be approved  3
```

```
Press ENTER to return to Cover Sheet
```

Coversheet

If you try to approve the document, by typing APP in the Action field, you will get the same type of error message - the GGS must be approved before the creator can approve the document.

```
+-----+
| >> Press Enter to return to Document Cover Sheet <<
|                                     VERification Audits NOT Passed
|
| Document ID: R0SS1991994  Summary: VISITNGS SCHOLAR
| Student ID: SS1234       Name: SCHOLAR, STEVEN
|-----|
| Error Text                                                    Section
| 1. The GGS document must be approved before the SS1 can be approved  3
|
|
|
|                                     Press ENTER to return to Cover Sheet
|-----+
|-- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 9/01/05 07:39 PM --
```

Coversheet

If you forget the doc ID# of the GGS document, place an 'X' next to Section 3, the GGS doc ID will be displayed at the top of the screen:

>>GGS vendor address: R0GGS999813 has been requested.<<

```
+-----+
| >>GGS vendor address: R0GGS999813 has been requested.<<
| Action:  ___      Address Selection/Check Routing      Section 3  of 5
|-----|
| VID: 2 SS1234      ___  Name: Scholar, Steven
|
| GGS      Addr Line 1: 3 ABBEY ROAD
|           Addr Line 2: ST JOHNS WOOD, NW8 9AY
|           City/St/Zip: LONDON                --
|           Phone:   ( 0   )      -
|
| Note: SS1 cannot be approved by creator until GGS is approved by the
| Scholarship desk. Send Non-Student Eligibility Verification form and
| required supporting documents to the Scholarship Desk in the Office of
| Accounting, please reference pending GGS document ID.
|
| Check Pick Up:  _
|-----+
```