

Example #1

Simple Case

1

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 such as the recipients' name and title of scholarship:

```
>> 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 the 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: R0SS1991995
Action:  ___ Summary: SMITH, JOHN - DEPT AWARD _____
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: ROSS1991995 - SMITH, JOHN - DEPT AWARD
|-----+
| 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: if question #5 is marked 'Y', the recipient must be registered full time to receive each payment. (registration will be checked for each payment date) 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:  R0SS1991995 - SMITH, JOHN - DEPT AWARD
|-----+
| 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)? Y
|
| 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

7

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. 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: ROSS1991995 - SMITH, JOHN - DEPT AWARD
|-----+
| 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 ----- 9/01/05 01:39 PM --
```

Section 2 – Student and account information

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After all information has been typed in, press Enter and *DEFINE will display a ‘successfully updated’ message at the top of the screen. 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: R0SS1991995 - SMITH, JOHN - DEPT AWARD
|-----+
| ID:   SMITHJ__ +                               Awardee is a UT Employee:  N
| Name:      First           Middle           Last           Suffix
|           Smith_____           _____           John           _____
|
| Total Award Amount:           100.00 +
|
| Award Amount by Semester:
|                               Fall   ( _ ) _____
|                               Spring ( _ ) _____
|                               Summer ( _ ) _____
| Offer Expiration Date (MMDDYY): _____
| Account Number:      3000002470 + Related Account:
| Account Title:       Various Donors-Variou Purposes
| Award Title:         Fellowship/Scholarship Award_____
|                               _____
|                               _____
| Special Purpose:    _   Travel N   Academic Competitive (Y/N):  N
+-----+
-- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 9/01/05 04:59 PM --
```


Section 3 – Address Selection/Check Routing

If the recipient doesn't have direct deposit on file, the check will be mailed. If the recipient is a student, the local and permanent address should appear in Section 3. Mark 'X' to select the address the check will be mailed to and press Enter.

```
+-----+
| >> Please enter your Updates or a Document Action. <<
| Action:  ____ Address Selection/Check Routing Section 3 of 5
|-----|
| VID: 2 SMITHJ 001 Name: Smith, John
|
| X LOCAL Addr Line 1: 2005 Freshman Dr
| Addr Line 2:
| City/St/Zip: AUSTIN TX 78723-3441
|
| _ PERM Addr Line 1: 2233 LAZY DAY LN
| Addr Line 2:
| City/St/Zip: DALLAS TX 75201-1234
|
| Last Semester Enrolled: 20052
|
| Check Pick Up: _
|
| If none of the addresses are correct, please contact the
| recipient to update their address.
|-----+
-- 0 UT Austin ----- PF1=Options ----- PF8=Exit ----- 9/01/05 05:12 PM --
```

Section 3 – Address Selection/Check Routing

If the recipient is a current UT employee and doesn't have direct deposit information on file, the campus and mailing address from the employee's records should appear in Section 3. Mark 'X' to select the address the check will be mailed to and press Enter.

```
+-----+
| >> Record was successfully updated <<
| Action:  ____      Address Selection/Check Routing      Section 3  of 5
|-----+
| VID: 2 sam0611      001  Name: Graduate, Sam
|
|  _  CAMPUS  Addr Line 1: K5300
|                Addr Line 2: ACCOUNTING, OFC OF
|                City/St/Zip: AUSTIN                      TX  78712
|
|  X  USMAIL  Addr Line 1: 11223 BUMPY HILL DR
|                Addr Line 2:
|                City/St/Zip: AUSTIN                      TX  78753
|
|
|                Check Pick Up:  _
|
|                If none of the addresses are correct, please contact the
|                recipient to update their address.
|-----+
| -- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 8/03/05 05:23 PM --
```

Section 3 – Address Selection/Check Routing

If the recipient is not an employee or student and doesn't have direct deposit information on file, the first 3 available vendor addresses should appear in Section 3. Mark 'X' to select the address the check will be mailed to and press Enter.

```
+-----+
| >> Please enter your Updates or a Document Action. <<
| Action:  ____      Address Selection/Check Routing      Section 3  of 5
|-----|
| VID: 2 DOE123      000  Name: Doe, Jane
|
| X  ADDR1  Addr Line 1: 1125 W STRAFORD AVE
|           Addr Line 2:
|           City/St/Zip: GILBERT                AZ  85233 - 4729
|
| _  ADDR2  Addr Line 1: 8710 MOSQUERO CIR
|           Addr Line 2:
|           City/St/Zip: AUSTIN                 TX  78748 - 5265
|
| _  ADDR3  Addr Line 1: 2121 GUADALUPE
|           Addr Line 2:
|           City/St/Zip: AUSITN                 TX  78712 -
|
|           Check Pick Up: _
|
|           If none of the above addresses are correct, please create a
|           GGS document with the correct address.
|-----+
| -- 0 UT Austin  ----- PF1=Options ----- PF8=Exit ----- 9/01/05 12:41 PM --
```

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 electronic transfer (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: R0SS1991995  Award Amt:      100.00      Unpaid Bal:      100.00
| -----
| 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)  _ _   100.00  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:          ROSS1991995
| Document Summary:    SMITH, JOHN - DEPT AWARD
| -----
| John Smith awarded the coveted department excellence scholarship for his
| amazing intelligence Added by: ACSAH 09/01/05_____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
| _____
+-----+
-- 0 UT Austin  ----- PF1=Options  ----- PF8=Exit  ----- 9/01/05 05:41 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  SMITH, JOHN          _____ EN      100.00  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: R0SS1991995
Action:  ___          Summary: SMITH, JOHN - DEPT AWARD _____
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: SMITHJ +
Award Title : Various Donors-Variou Purpos          Name: Smith, John
Award Amount: $          100.00 +          School: 2          Major: 00800 Class: 4
Award Status: Offered
Next Payment: 080505          YYS: 056 Hours: 12          Student: Y
          US Citizen: Y
SFS Status:          SFS Counselor: 00          Fee Bill Status: Registered

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