

Financial Aid Award Workflow Quick Guide

Qualified Scholarships, Non-Qualified Scholarships and Fellowships to enrolled students are processed through the Financial Aid Award Workflow. For additional information about paying students please review the [Pay Students](#) webpage. Individuals who do not currently have access to the Financial Aid Award Workflow should contact their [Departmental Banner Liaison](#) for access approval.

Step by Step

1. Go to <https://workflow.gmu.edu:4443/wfprod/home/worklist.do>
2. Go to User Profile / My Processes
3. Choose the FIN_Financial Aid Award link
4. Enter a “Workflow Specifics Name”, student G number, student name and choose Tuition Only (Y or N)
 - a. To make finding transactions easier, enter a “Workflow Specifics Name” using the following format: Award Type (GCW, SCH, TGA), Student Last Name, and Term (e.g. “SCH-Smith-201770”).
 - b. Tuition Only = Y → non-refundable awards (Tuition Grant Award and GradCommonwealth), only pays tuition and fees in the student account
 - c. Tuition Only = N → refundable awards (Scholarship Awards and GradCommonwealth), award will pay outstanding charges first and a refund will be issued for the balance
5. Choose Start Workflow
6. Go to Home/Worklist and look for the name you gave to your workflow
7. Fill out your department and extension
8. Select the desired operation from the following options:
 - a. **Add funds**
 - b. **Reduce Funds:** select this operation when:
 - I. You need to decrease the amount already awarded after 07/01/22.
 - II. **Important:** Use this option to cancel (reduce to zero) FY22 and prior FY transactions that would have been originally entered with Chart 1 FOAPAL
 - c. **Request Financial Aid cancel a completed award transaction** (*requires a transaction ID*):
 - I. Only valid for original awards entered after 07/01/22
 - d. **Permanently stop this incomplete transaction**
9. Select Academic term: current and previous year terms are available.
10. **NEW FEATURE:** Select if the award is a Grad Commonwealth Award (Yes or No) in the dropdown
NOTE for FY23: In Chart 1, these awards were entered in a separate Org titled “Grad Commonwealth [College] Odd/Even FY”. In Chart P (effective FY23) these awards are recorded in the department Org(s):
 - a. “Yes”: Workflow will assign appropriate Fund code to the GCW transaction, based on term/fiscal year (24310 for even year and 24311 for odd year); The system will use the Org in the funding source area along with the central GradCommonwealth fund (note: only Orgs can be used in the funding source area, if a fund is entered, Workflow will raise an error indicating a fund cannot be used for a Grad Commonwealth award)
 - b. “No”: for Tuition Grants and Scholarships awards

11. If the award is for a Fall Tuition Only = Y, user has the option to automatically create a spring term award by selecting “Yes” under the optional “Create spring term award?” question
12. Select “Yes” or “No” if students will be registering for classes
13. Select “Yes” or “No” if award is to be charged to 78522
14. The following data will auto-populate: Student Name in Banner is displayed to confirm that you have the correct G number Citizenship, Academic Level, Domicile, and Tuition Rate.
15. Account number options are displayed in the dropdown according to the following table:

STU LV	TUITIONONLY			
	No		Yes	
CE (Continuing Education – CEU)	78520	GR Refundable Aid	78510	Masters Tuition and Fee Grant
	78525	Graduate Health Subsidy	78515	Doctors Tuition and Fee Grant
GR (Graduate)	78520	GR Refundable Aid	78510	Masters Tuition and Fee Grant
	78525	Graduate Health Subsidy	78515	Doctors Tuition and Fee Grant
LW (Law)	78520	GR Refundable Aid	78510	Masters Tuition and Fee Grant
	78525	Graduate Health Subsidy	78515	Doctors Tuition and Fee Grant
ND (Non-Degree)	78570	UG Refundable Aid	78510	Masters Tuition and Fee Grant
	78520	GR Refundable Aid	78515	Doctors Tuition and Fee Grant
	78525	Graduate Health Subsidy	78560	Undergraduate Tuition and Fees
UG (Undergraduate)	78570	UG Refundable Aid	78560	Undergraduate Tuition and Fees

16. Choose **Fund or Org** for the transaction to be charged. Please note, only Chart P is active as of 07/01/22. Activity Code is optional. Workflow will send an “Award error” email to the user if the Fund/Org provided has not been assigned a Default FOAPAL in Banner. If you selected a GradCommonwealth, only an Org may be entered.
 - d. **Transaction Amount** – the amount for this award
 - e. **Net Amount** – total of all award amount(s) expected for this student in this term
 - f. **Enter Dept/Non-PI approver ID** (GMU NetID only)
17. **International Students** - certain student citizenship statuses will be electronically routed to the International Tax Office to determine whether tax withholding is required. In cases where the request is for refundable awards to be paid to international students, questions regarding tax withholding should be answered.
18. Select “Complete” to send the transaction to the Approver(s). You should receive a confirmation email indicating the type of award transaction and student information. If there was an error, you should receive an email explaining the error and appropriate correction.

Workflow Notes

- You should receive an email once all approvals have been received and Financial Aid has entered the award in Banner. The email will contain a "Transaction ID" that can be used later on if the award needs to be reduced or cancelled.
- Once awards are entered in the student accounts, Financial Aid Office will run a process to charge the appropriate FOAPL. It might take 1-2 weeks for the charge to show up in Finance.
- If the award has more than 1 funding source or two different workflows are submitted for the same student/term/type of award, a manual JV (Journal Vouchers) is submitted to charge the FOAPL accordingly and that process might take a little more time.

For questions, problems, or comments related to Financial Aid please email [Craig Raulli](mailto:Craig.Raulli@gmu.edu) or [Matt Deters](mailto:Matt.Deters@gmu.edu) or call (703) 993-2360. For technical issues with the Workflow please contact the faateam@gmu.edu.