

## Processing Bursaries in BSAC

Status quo for counselor – all awarding must commence with an application from Minerva. Once the counselor has “created” the award it will be populated into Banner tables.

- Use KVISAWK to find all generic bursaries. Press F7 then type X%B% in Aid Fund Code and ACAP in Aid Fund Status

Oracle Developer Forms Runtime - Web: Open > KVISAWK

Student Aid Working Inquiry [1.0] KVISAWK 7.3 (DBAN4)

Aid Year: 0809 2008/2009 Aid year (Terms 200809, 200901, 200905)

Aid Period: YEAR YEAR

Aid Year	Aid Period	ID	Last Name	First Name	Middle Name	Aid Fund Code	Aid Fund Code Sequence Number	Aid Fund Status	Aid Fund Status Date	Detail Single Usage	Disbursable	Disl
						X%B%		ACAP		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Enter a query; press F8 to execute, Ctrl+Q to cancel.  
Record: 1/1 | Enter-Qu... | <OSC>

Hints – If you type in just X% you will find ALL generic awards  
 If you leave the Aid Fund Status blank you will find all awards regardless of status  
 You can also use the Disbursed indicator to refine your search

Once you have executed the query (F8) you will see:

Oracle Developer Forms Runtime - Web: Open > KVISAWK

Student Aid Working Inquiry [1.0] KVISAWK 7.3 (DBAN4)

Aid Year: 0809 2008/2009 Aid year (Terms 200809, 200901, 200905)

Aid Period: YEAR YEAR

Aid Year	Aid Period	ID	Last Name	First Name	Middle Name	Aid Fund Code	Aid Fund Code Sequence Number	Aid Fund Status	Aid Fund Status Date	Detail Single Usage	Disbursable	Disl
0809	YEAR					X_INCRBUR	Generic In-	4	ACAP Approve	23-SEP-2008	<input type="checkbox"/>	<input type="checkbox"/>
0809	YEAR					X_INCRBUR	Generic In-	1	ACAP Approve	24-SEP-2008	<input type="checkbox"/>	<input type="checkbox"/>
0809	YEAR					X_INCRBUR	Generic In-	2	ACAP Approve	24-SEP-2008	<input type="checkbox"/>	<input type="checkbox"/>
0809	YEAR					X_INCRBUR	Generic In-	3	ACAP Approve	24-SEP-2008	<input type="checkbox"/>	<input type="checkbox"/>
0809	YEAR					X_INCRBUR	Generic In-	1	ACAP Approve	24-SEP-2008	<input type="checkbox"/>	<input type="checkbox"/>

The aid year in which the student received this award.  
Record: 1/5 | ... | <OSC>

Once you have your list of students you are ready to begin "assigning/splitting" into the "named award"

- Getting the ID into KVAAWRD
  1. Place your cursor on the record of the student you want to handle and then rollback (F7) followed by F5 type in KVAAWRD and Enter – this will bring forward the ID of the student
  2. Open up another session of INB and go to KVAAWRD and type in the ID number
  3. Copy the ID of the student you want to handle and then paste it in a new session of INB
- Once in KVAAWRD verify that you are in the correct Aid Year and Aid Period (0809, YEAR)

Oracle Developer Forms Runtime - Web: Open > KVISA WK - KVV TREQ - KVAAWRD

File Edit Options Block Item Record Query Tools Help

Applicant Institutional Award [1.0] KVAAWRD 7.3 [1.6] (DBAN4)

ID: [ ] [ ] Aid Year: 0809 2008/2009 Aid year (Terms 200809, 200901, 200905)  
Aid Period: YEAR YEAR

Third Party Contract

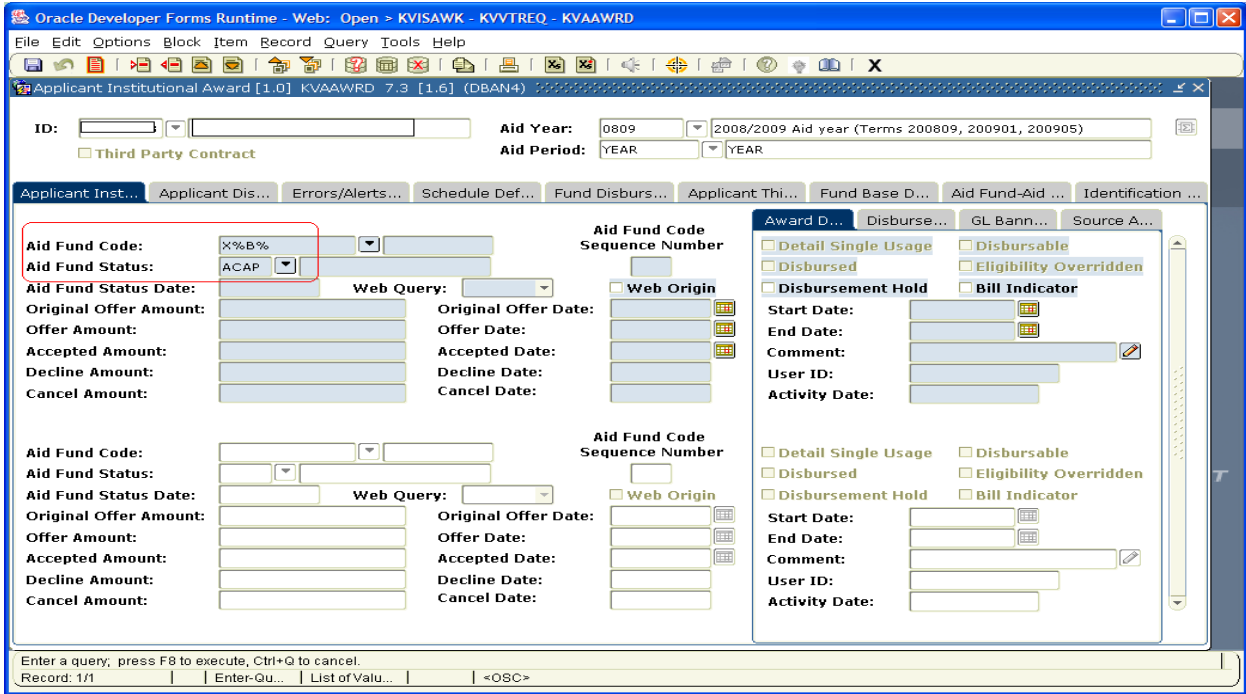
Applicant Inst... Applicant Dis... Errors/Alerts... Schedule Def... Fund Disburs... Applicant Thi... Fund Base D... Aid Fund-Aid ... Identification ...

Aid Fund Code: [ ] [ ] Aid Fund Code Sequence Number [ ]  
Aid Fund Status: [ ] Aid Fund Code Sequence Number [ ]  
Aid Fund Status Date: [ ] Web Query: [ ]  Web Origin  
Original Offer Amount: [ ] Original Offer Date: [ ]  
Offer Amount: [ ] Offer Date: [ ]  
Accepted Amount: [ ] Accepted Date: [ ]  
Decline Amount: [ ] Decline Date: [ ]  
Cancel Amount: [ ] Cancel Date: [ ]

Detail Single Usage  Disbursable  
 Disbursed  Eligibility Overridden  
 Disbursement Hold  Bill Indicator  
Start Date: [ ]  
End Date: [ ]  
Comment: [ ]  
User ID: [ ]  
Activity Date: [ ]

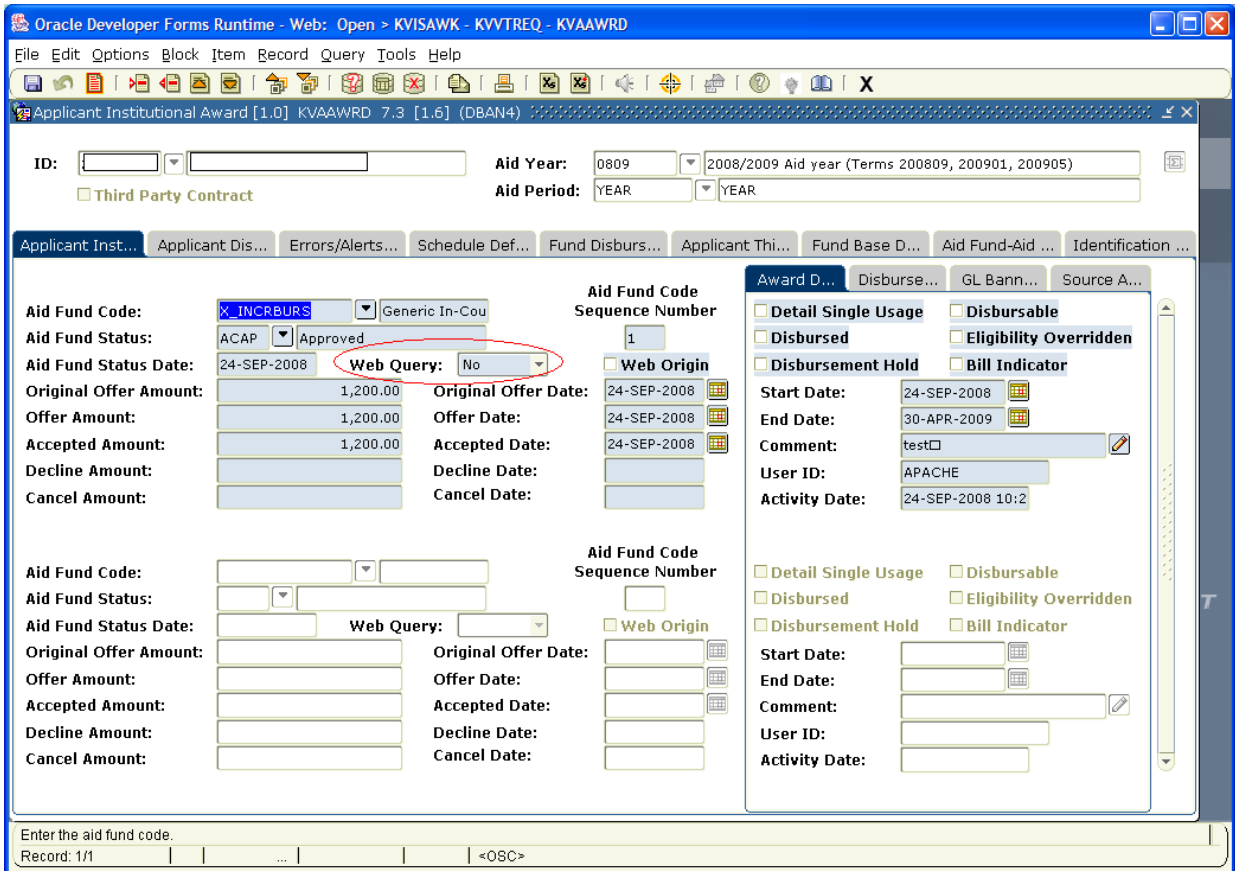
Enter the aid year.  
Record: 1/1 | ... | List of Valu... | <OSC>

- Go to Next Block (Ctrl PgDn) and do a search for the Generic Bursary (similar to KVISA WK)



Hints – If you type in just X% you will find ALL generic awards- regardless of Aid Fund Status

Once you have found the record(s) you need to work with you will notice that the Web Query is set to No. This means that the students cannot view this award on the web. We have set this indicator to No for ALL Generic Need-Based Aid.



Once you are on the record you need - go to Options and choose Split This Award

The screenshot shows the Oracle Developer Forms Runtime interface. The 'Options' menu is open, and 'Split This Award' is highlighted. The main form displays the following fields and values:

- Year:** 0809 (2008/2009 Aid year (Terms 200809, 200901, 200905))
- Period:** YEAR
- Aid Fund Code Sequence Number:** 1
- Web Origin:**
- Start Date:** 24-SEP-2008
- End Date:** 30-APR-2009
- Comment:** test
- User ID:** APACHE
- Activity Date:** 24-SEP-2008 10:2

Other fields include 'Original Offer Amount', 'Offer Amount', 'Accepted Amount', 'Decline Amount', and 'Cancel Amount', all currently empty.

You will be taken to a new form KZIAEX – Extended Award Data. This form is providing you with the details that originated from the counsellor’s assessment/approval of an award.

The screenshot shows the Oracle Developer Forms Runtime interface for the 'Extended Award Data' form. The form includes the following fields and values:

- Student ID:** [Empty]
- Aid Fund:** X\_INCRBURS
- Aid Year:** 0809 (2008/2009 Aid year (Terms 200809, 200901, 200905))
- Aid Period:** YEAR
- Aid Fund Seq#:** 1
- Offered Amount:** [Empty]
- Accepted Amount:** [Empty]

The form has three tabs: 'Institutional Award (Supplemental)', 'Pre-Disbursement Schedule', and 'Loan Properties'. The 'Institutional Award (Supplemental)' tab is active, showing fields for:

- Award Start Term:** [Empty]
- Award End Term:** [Empty]
- Travel Indicator:**
- Renewable Indicator:**
- Renewability Year:** [Empty] of [Empty]
- Next Renew Term:** [Empty]
- Constituency at Offer:** [Empty]
- Constituency at Disburse:** [Empty]
- Cheque Destination:** [Empty]
- Offer Notification Date:** [Empty]
- Disbursement Notification Date:** [Empty]

At the bottom, there are sections for 'Application' and 'Financial Aid' with 'Select Award' and 'Select Application' buttons.

Once you move to the Next Block (Ctrl PgDn) you will see that several fields may or may not show depending on the “type” of award.

In this example – you will see that the Renewability Indicator is set to N (No) and as such the Renewability Year of Year and Next Renew Term have disappeared; as well as the Aid Year, Aid Period, Aid Fund, Seq # and Select Award button.

Oracle Developer Forms Runtime - Web: Open > KVISA WK - KVVTR EQ - KVAAWRD

File Edit Options Block Item Record Query Tools Help

Extended Award Data KZAI AEX 7.3 [1.0] (DBAN4)

Student ID: [ ] Aid Fund: X\_INCRBURS Generic In-Course Bursary [UNIV:BURS:INCR:NR]

Aid Year: 0809 2008/2009 Aid year (Terms 200809, 200901) Aid Fund Seq#: 1

Aid Period: YEAR YEAR Offered Amount: 1,200.00 Accepted Amount: 1,200.00

Award Lookup

Institutional Award (Supplemental) Pre-Disbursement Schedule

Award Start Term: 200809 Award End Term: 200901

Constituency at Offer: CDN Constituency at Disburse: Offer Notification Date: Disbursement Notification Date:

Travel Indicator: N Cheque Destination: Cashier's Office

Renewable Indicator: N

Application Financial Aid

Term	Program	Seq#
200809	IAA	1

Select Application

Record: 1/1 ... List of Valu... <OSC>

The key areas that are of interest to the Funds Administrator would be the Accepted Amount, the Constituency at Offer, the Travel Indicator, and the Renewable Indicator. All these can be used as "guides" to help you choose the "named award".

In the bottom section you will see a reference to the Application that the student had filled out.

If you move to the Next Block (Ctrl PgDn) you will see the Pre-Disbursement Schedule as set up by the counselor. In this example there are 4 entries:

Minerva - DBAN4

MAIN MENU Personal Employee Applicant Finance SR Admin Reports AR Admin HELP EXIT

View Award(s)

Student ID: [ ]

Last Name: [ ]

First Name: [ ]

Key: 0809-YEAR-X\_INCRBURS-01

**Bursary**

General			
Disb. Amount:	Offer Amount:	Accept Amount:	Status:
	\$1,200.00	\$1,200.00	Approved
Disb. Date:	Offer Date:	Accept Date:	Status Date:
	Sep 24, 2008	Sep 24, 2008	Sep 24, 2008
Disb. ResidcyGrp:	Offer ResidcyGrp:	Stdn. Display:	Travel:
FOAPAL: N/A	CDN	No	No
	Cheque Dest.:	Cashier's Office	

Span / Eligibility Period		Renewability	
Start Term:	Fall 2008	End Term:	Winter 2009
Start Date:	Sep 24, 2008	End Date:	Apr 30, 2009
Renewable:	No		
Renew Term:			
Renew Year:			

Disbursements							
Type	Term	Pay Amount	Pay Date	Paying Loan	Orig. Amount	Orig. Date	Doc. Ref#
To Fees	Fall 2008	\$300.00	Sep 24, 2008				
To Fees	Winter 2009	\$300.00	Jan 05, 2009				
To Cheque	Fall 2008	\$400.00	Sep 24, 2008				
To Cheque	Winter 2009	\$200.00	Feb 01, 2009				

Staff Only Comments

test

Done ceres.cc.mcgill.ca:4459

Oracle Developer Forms Runtime - Web: Open > KVISAWK - KVVTTREQ - KVAAWRD - KZAIAX

File Edit Options Block Item Record Query Tools Help

Extended Award Data KZAIAX 7.3 [1.0] (DBAN4)

Student ID: [ ] [ ] Aid Fund: X\_INCRBURS Generic In-Course Bursary [UNIV:BURS:INCR:NR]

Aid Year: 0809 2008/2009 Aid year (Terms 200809, 20) Aid Fund Seq#: 1

Aid Period: YEAR YEAR Offered Amount: 1,200.00 Accepted Amount: 1,200.00

Award Lookup

Institutional Award (Supplemental) Pre-Disbursement Schedule

Sequence Number	Disbursement Term	Posting Method	Payment Date	Loan Balance to Pay	Payment Amount
1	200809	Accounts Receiv...	24-SEP-2008		300.00
2	200901	Accounts Receiv...	05-JAN-2009		300.00
3	200809	Accounts Payable	24-SEP-2008		400.00
4	200901	Accounts Payable	01-FEB-2009		200.00
Payment Sum:					1,200.00

Record: 1/4

Note – Any modification you make on this form will be reflected back on Minerva  
You may alter Payment Dates and Payment Amount\*\*

Oracle Developer Forms Runtime - Web: Open > KVISAWK - KVVTTREQ - KVAAWRD - KZAIAX

File Edit Options Block Item Record Query Tools Help

Extended Award Data KZAIAX 7.3 [1.0] (DBAN4)

Student ID: [ ] [ ] Aid Fund: X\_INCRBURS Generic In-Course Bursary [UNIV:BURS:INCR:NR]

Aid Year: 0809 2008/2009 Aid year (Terms 200809, 20) Aid Fund Seq#: 1

Aid Period: YEAR YEAR Offered Amount: 1,200.00 Accepted Amount: 1,200.00

Award Lookup

Institutional Award (Supplemental) Pre-Disbursement Schedule

Sequence Number	Disbursement Term	Posting Method	Payment Date	Loan Balance to Pay	Payment Amount
1	200809	Accounts Receiv...	24-SEP-2008		300.00
2	200901	Accounts Receiv...	05-JAN-2009		300.00
3	200809	Accounts Payable	24-SEP-2008		300.00
4	200901	Accounts Payable	01-JAN-2009		300.00
Payment Sum:					1,200.00

The dollar value for Sequence Numbers 3 & 4 were modified to \$300 each - originally Sequence 3 was for \$400 and Sequence 4 was for \$200.  
Also the Payment Date of Sequence 4 has been modified - it was originally scheduled for 01-FEB-2009

Record: 4/4

\*\*If you alter a Payment Amount always make sure your Payment Sum is equal to the Accepted Amount

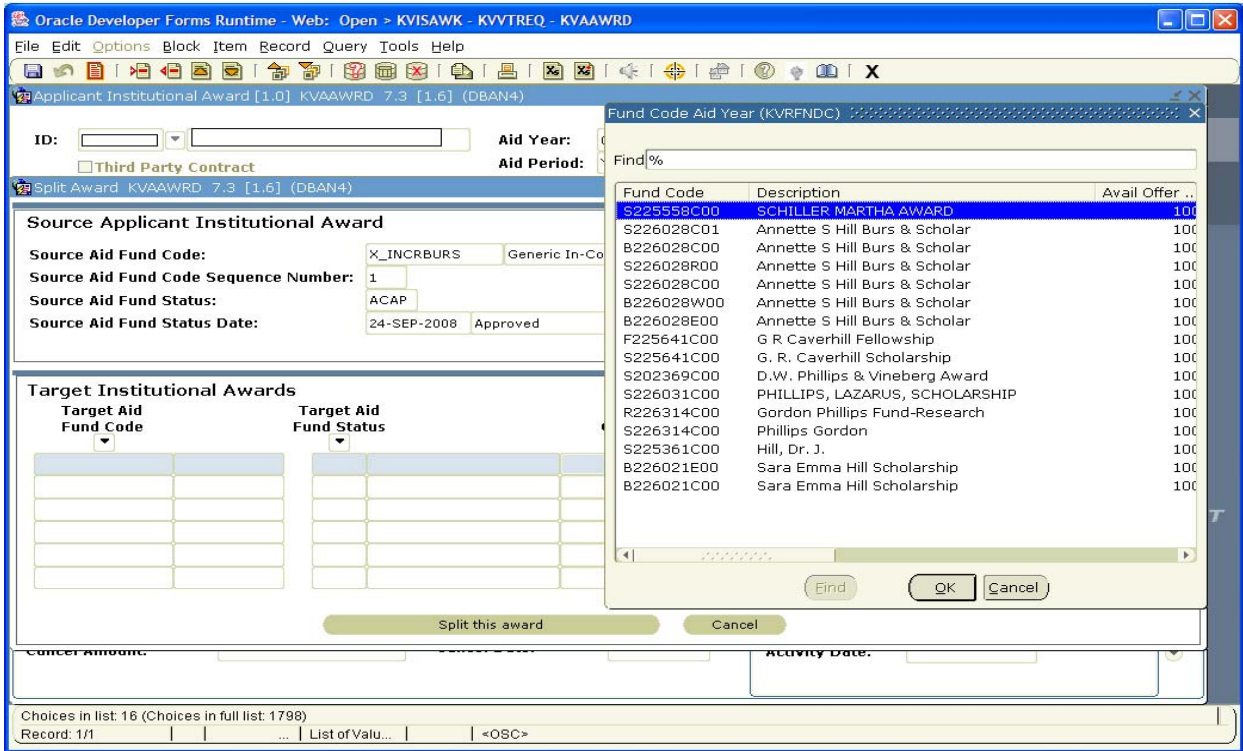
Once you have finished viewing the information you will need to exit this form (Ctrl Q) and then you will be taken to the Split Award Screen

From here you will be able to “assign/split” to the named award.

If you know the Aid Fund Code you want to use you can simply type it into the field. If you are unsure of the Aid Fund Code but you have the name or Fund number for the award, you can use the LOV (F9) function and do a search.

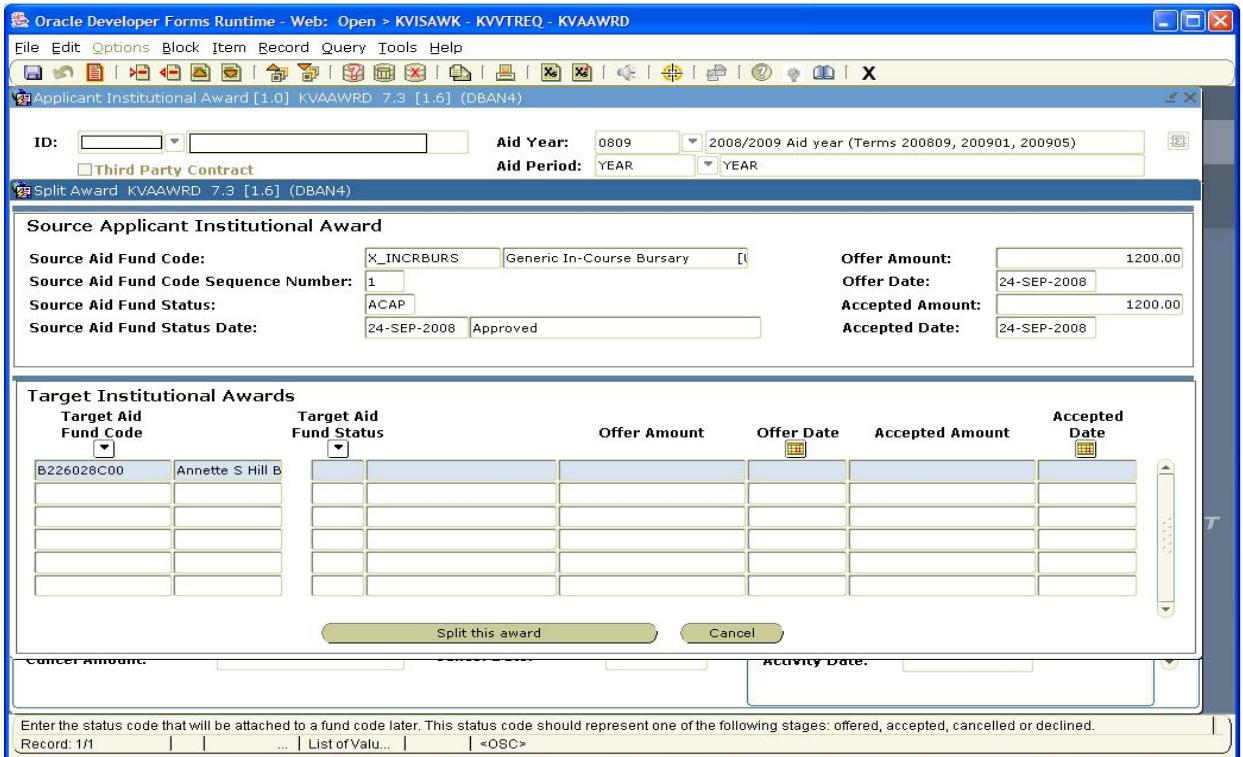
You can find an Aid Fund Code based on the Fund number or the description. Make sure to use the Wild Cards % at the beginning and end of your search string. The search is NOT case sensitive.

Here is a search for A.S. Hill:



You will note that it has returned all Aid Fund Codes where the Description contained "hill".

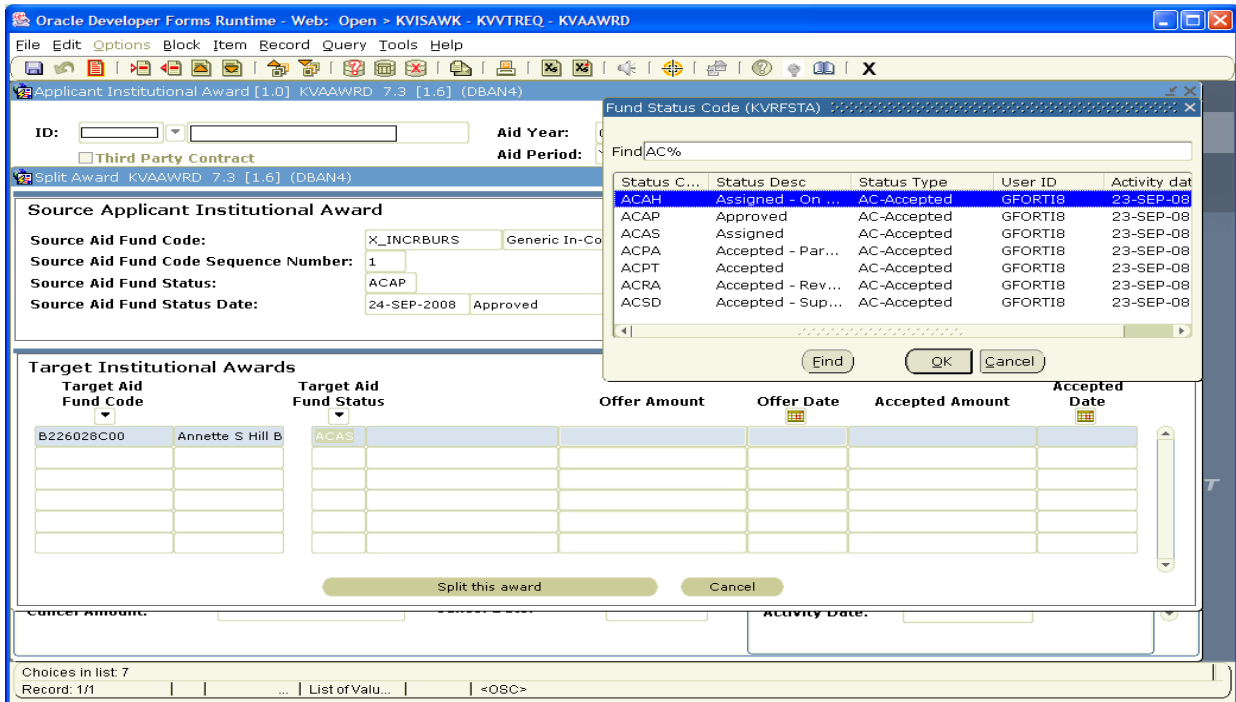
You can double click on the Aid Fund Code you want to use and it will be copied into the Target Aid Fund Code





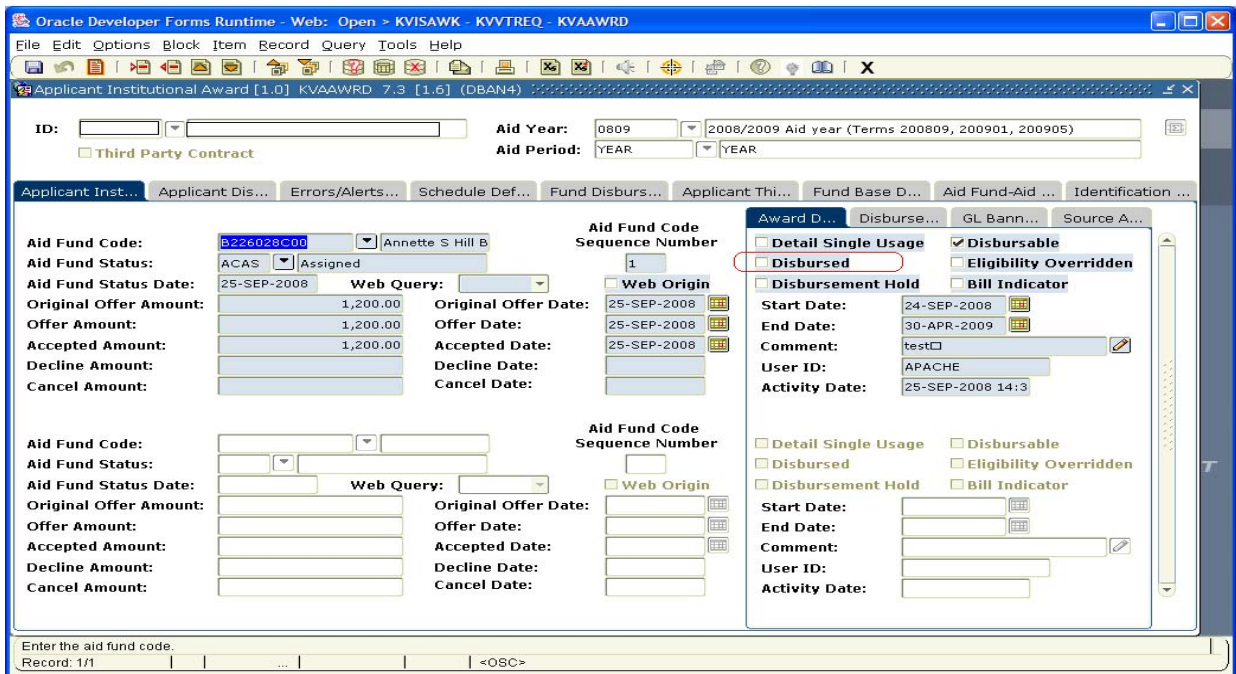
From here the user MUST change the Target Aid Fund Status to ACAS. It can be typed directly into the field or you can use the LOV (F9) to find all possible codes.

For the purposes of Bursaries all "assigned" awards should have the status of ACAS (Accepted Assigned).



These previous 2 means of entering an Aid Fund Code

Once you have clicked on Split this award you will see the following:



Oracle Developer Forms Runtime - Web: Open > KVISA WK - KVV TREQ - KVA AWRD

File Edit Options Block Item Record Query Tools Help

Applicant Institutional Award [1.0] KVA AWRD 7.3 [1.6] (DBAN4)

ID:  Aid Year: 0809 2008/2009 Aid year (Terms 200809, 200901, 200905)

Third Party Contract Aid Period: YEAR YEAR

Applicant Inst... Applicant Dis... Errors/Alerts... Schedule Def... Fund Disburs... Applicant Thi... Fund Base D... Aid Fund-Aid ... Identification ...

Aid Fund Code: B226028C00 Annette S Hill B

Aid Fund Status: ACAS Assigned

Aid Fund Status Date: 25-SEP-2008 Web Query:

Original Offer Amount: 1,200.00 Original Offer Date: 25-SEP-2008

Offer Amount: 1,200.00 Offer Date: 25-SEP-2008

Accepted Amount: 1,200.00 Accepted Date: 25-SEP-2008

Decline Amount: Decline Date:

Cancel Amount: Cancel Date:

Aid Fund Code Sequence Number: 1

Web Origin:

Memo Amount:

Paid Amount:

Total Disbursed: 0.00

Government Received Amount:

Government Received Amount Date:

Enter the aid fund code.

Record: 1/1 <OSC>

Oracle Developer Forms Runtime - Web: Open > KVISA WK - KVV TREQ - KVA AWRD

File Edit Options Block Item Record Query Tools Help

Applicant Institutional Award [1.0] KVA AWRD 7.3 [1.6] (DBAN4)

ID:  Aid Year: 0809 2008/2009 Aid year (Terms 200809, 200901, 200905)

Third Party Contract Aid Period: YEAR YEAR

Applicant Inst... Applicant Dis... Errors/Alerts... Schedule Def... Fund Disburs... Applicant Thi... Fund Base D... Aid Fund-Aid ... Identification ...

Aid Fund Code: B226028C00 Annette S Hill B

Aid Fund Status: ACAS Assigned

Aid Fund Status Date: 25-SEP-2008 Web Query:

Original Offer Amount: 1,200.00 Original Offer Date: 25-SEP-2008

Offer Amount: 1,200.00 Offer Date: 25-SEP-2008

Accepted Amount: 1,200.00 Accepted Date: 25-SEP-2008

Decline Amount: Decline Date:

Cancel Amount: Cancel Date:

Aid Fund Code Sequence Number: 1

Web Origin:

Source Aid Fund Code: X\_INCRBURS Generic In-Course Bursary

Source Aid Fund Code Sequence Number: 1 Source Offer Amount: 1,200.00

Source Offer Date: 24-SEP-2008 Comment: test

Source Aid Fund Code:

Source Aid Fund Code Sequence Number:  Source Offer Amount:

Source Offer Date:  Comment:

FRM-40202: Field must be entered.

Record: 2/2 List of Valu... <OSC>

It is strongly advised that users use the KZIFDQY (Dairy Queen) form to search for a list of valid Aid Fund Codes. (For complete details see the "How to Search for Available Aid Funds using KZIFDQY" document.)

Once in the Dairy Queen form you will need to specify a few fields:

Oracle Developer Forms Runtime - Web: Open > KVISA WK - KVV TREQ - KVAAWRD - KVAAREQ

File Edit Options Block Item Record Query Tools Help

Applicant Tracking Requirements [1.0] KVAAREQ 7.3 (DBAN4)

ID:

Aid Year: 0809 2008/2009 Aid year (Terms 200809, 200901, 200905)

Aid Period: YEAR YEAR

Tracking Requirement Code	Status Code	Status Code Date	Satisfy Indicator	Establish Date	Comments	User ID
		25-SEP-2008		25-SEP-2008		

FRM-40350: Query caused no records to be retrieved.  
Record: 1/1 ... List of Valu... <OSC>

Displaying Consent in KVAAREQ:

Oracle Developer Forms Runtime - Web: Open > KVISA WK - KVV TREQ - KVAAWRD - KVAAREQ

File Edit Options Block Item Record Query Tools Help

Applicant Tracking Requirements [1.0] KVAAREQ 7.3 (DBAN4)

ID:

Aid Year: 0809 2008/2009 Aid year (Terms 200809, 200901, 200905)

Aid Period: YEAR YEAR

Tracking Requirement Code	Status Code	Status Code Date	Satisfy Indicator	Establish Date	Comments	User ID	
CONSENT	Student agrees tha SA	Requirement Satisf	25-SEP-2008	Satisfied	25-SEP-2008		APACHE

Enter the tracking requirement code assigned to the applicant.  
Record: 1/1 ... List of Valu... <OSC>