Scholarships Workflow & Workday Process Steps

UCF | Student Financial Assistance
UNIVERSITY OF CENTRAL FLORIDA

The Scholarship forms and process in Workday depends on the specifc funding source. See chart below for your scholarship type and funding source.

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Type of Scholarship	Funding Source	STEP 1 — Establish the Scholarship with SFA	STEP 2 — Support Documents	STEP 3 — Workday Process	Workday Event
NEW Scholarship Program or NEW Gift	**Foundation Gift UCF Grant Research Grant E&G or Other UCF Funding**	Step 1 is to reach out to Student Financial Assistance to request review and setup for your new scholarship program. You will be asked a variety of questions needed to determine the nature and requirements of the scholarship setup. Please complete the New Scholarship Questionnaire available from our website under Forms, Departmental Forms. Please email the completed form to one of the following: New Gifts - email SFAFNDScholarships@ucf.edu All Others - email SFADeptSch@ucf.edu	Please provide any documentation regarding the requirements of your scholarship: Gift Agreement or Gift ID, applications, contracts, websites, etc. Please attach support documents to your completed questionnaire and email to SFA.	Once your new Scholarship Award has been setup by SFA, please follow one of the established procedures below to communicate your student awards to SFA and process funding commitments within Workday.	Differs depending on your specific scholarship funding source. See items 2-6 below in grid.
		[New Scholarship Questionnaire](#)			

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Type of Scholarship	Funding Source	STEP 1 — How to communicate awards to SFA	STEP 2 — Funding Support Document	STEP 3 — Workday Process	Workday Event
Foundation Scholarships	**Foundation Gift or Foundation Designation**	Complete the Excel Award Estimates Template from our website under Forms, Departmental Forms. Please email to SFA: SFAFNDScholarships@ucf.edu	Foundation Scholarship Form should be downloaded from the UCF Foundation website under About/Documents & Policies/Internal Forms, and completed with signatures.	Forward your signed completed Foundation Scholarship form to your Finance Business Center for Gift funding transfer to Student Financial Assistance. *Reminder: the worktags on the form and worktags used on the journal must match. Note: Program ID for all Foundation Scholarship Gifts is PG86 regardless of default.*	Intercompany Journal -Journal Source = Foundation Scholarships. -Gift ID, Scholarship Name, and Term should be in Memo Header. -Use debit line information for your Balancing Fund and Optional Balancing Worktags. -Debit to FDN Company, your Gift worktags but with Program code PG86 used for all gifts, ledger account 65200, Spend Category SC0505, line memo should include names, IDs, Amounts, and Term. -Credit to UNV Company, finaid grant SFA10148, ledger account 48700, Revenue Category RC1213 line memo should include student names, IDs, Amounts, and Term External Reference ID should = Gift ID on the credit line.
		[Scholarship Award Estimates Template](#)	[UCF Foundation Forms](#)		

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Type of Scholarship	Funding Source	STEP 1 — How to communicate awards to SFA	STEP 2 — Funding Support Document	STEP 3 — Workday Process	Workday Event
Departmental Scholarships	**UCF Grant**	Complete the Excel Award Estimates Template from our website under Forms, Departmental Forms. Please email to SFA: SFADeptSch@ucf.edu.	Student Award Request Form should be downloaded from the SFA website under Forms/Departmental Forms.	Forward your signed completed Student Award Request form to your Finance Business Center for funding transfer to Student Financial Assistance.	Manual Journal -Journal Source = Scholarships. -Debit to your grant worktags, ledger account 69700:Interfund Transfer Out, and spend category SC0901 Transfer to FD765 Unrestricted Scholarships. -Credit to finaid grant worktags, Ledger account 49700:Interfund Transfer In with the revenue category that indicates a transfer from your specific grant fund. Example: RC1513 Transfer from FD500 Sponsored Programs – Federal.
		[Scholarship Award Estimates Template](#)	[Student Award Request Form](#)		

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Type of Scholarship	Funding Source	STEP 1 — How to communicate awards to SFA	STEP 2 — Funding Support Document	STEP 3 — Workday Process	Workday Event
Departmental Scholarships	**UCF Research Foundation Grant**	Complete the Excel Award Estimates Template from our website under Forms, Departmental Forms. Please email to SFA: SFADeptSch@ucf.edu.	Student Award Request Form should be downloaded from the SFA website under Forms/Departmental Forms.	Forward your signed completed Student Award Request form to your Finance Business Center for funding transfer to Student Financial Assistance.	Intercompany Journal -Journal Source = Scholarships. -Debit to RFD Company, your grant worktags, ledger account 65200:Scholarships & Fellowships, and spend category SC0505 Scholarships/Fellowships. - Credit to UNV Company, finaid grant worktags, ledger account 48300:Intercompany Transfer In - University of Central Florida Research Foundation, Inc, with revenue category RC1115 Intercompany Transfer - University of Central Florida Research Foundation, Inc.
		[Scholarship Award Estimates Template](#)	[Student Award Request Form](#)		

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Type of Scholarship	Funding Source	STEP 1 — How to communicate awards to SFA	STEP 2 — Funding Support Document	STEP 3 — Workday Process	Workday Event
Departmental Scholarships	**Non-Gift Non-Grant Non-E&G Non-Carryforward**	Complete the Excel Award Estimates Template from our website under Forms, Departmental Forms. Please email to SFA: SFADeptSch@ucf.edu.	Student Award Request Form should be downloaded from the SFA website under Forms/Departmental Forms.	Forward your signed completed Student Award Request form to your Finance Business Center for funding transfer to Student Financial Assistance.	Manual Journal -Journal Source = Scholarships. -Debit to your funding worktags, ledger account 69700:Interfund Transfer Out, and spend category SC0901 Transfer to FD765 Unrestricted Scholarships. -Credit to finaid grant worktags, ledger account 49700:Interfund Transfer In with the revenue category that indicates a transfer from your specific fund. Examples: RC1489 Transfer from FD322 Auxiliary - Academic Support RC1589 Transfer from FD880 Activity and Service Fee RC1534 Transfer from FD565 Sponsored Research Administration.
		[Scholarship Award Estimates Template](#)	[Student Award Request Form](#)		

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Type of Scholarship	Funding Source	STEP 1 — How to communicate awards to SFA	STEP 2 — Funding Support Document	STEP 3 — Workday Process	Workday Event
Departmental Scholarships	**E&G or Carryforward**	Complete the Excel Award Estimates Template from our website under Forms, Departmental Forms. Please email to SFA: SFADeptSch@ucf.edu.	Student Award Request Form should be downloaded from the SFA website under Forms/Departmental Forms.	Forward your signed completed Student Award Request form to your Finance Business Center for Budget Amendment to Student Financial Assistance.	Budget Amendment -BA from your E&G budget to SFA's E&G budget for awarding; -Debit to SFA worktags: D295, CC10306, FD110, PG86, ST101, the finaid grant for your scholarship program, ledger account 65300, Add Sch name and term to memo line. -Credit to your E&G worktags, ledger account 65200 or whichever account your budget resides that you are moving to SFA.
		[Scholarship Award Estimates Template](#)	[Student Award Request Form](#)		