

SARAS

Procedures for

Departments



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SARAS Procedures

When a department would like to award a student a scholarship, they can submit a SARAS authorization through to Student Financial Services. The SARAS authorization is used to manually process a scholarship, and have it placed on the student’s financial aid package.

Where do we do it?

SARAS – SFSpartners.wsu.edu -> SARAS -> Scholarship Authorizations

The procedures for scholarships and waivers are nearly identical. This procedure will cover Scholarship Authorizations.

Expert Staff

Steven Julian – Financial Aid Advisor

Heather Morgan – Assistant Director of Program Administration

How do we do it?

Navigating in the Partner Portal

1. Below is a screen shot of the first screen in the SFS Partner Portal. SARAS is the first button under the “Partner Tools.” That is where you will want to go in order to log in.



2. This is the SARAS home page. Here you can request access to the SARAS databases, the Departmental Scholarships Authorization database and the Waivers Authorization page.

Additionally, from this screen you are able to submit a request to access either one of the databases.

WSU Scholarships and Resources Authorization Site (SARAS)

This site is to be used by authorized institutional staff to submit funding requests designated for enrolled students to be accounted for as an educational resource and to be processed to their student account. The goal of this single entry site is to ensure that all such funding requests are correctly accounted for by Student Financial Services and University Receivables. This system will allow for financial aid to account for all such necessary funding regardless of whether the enrolled student has a FAFSA on file or not at the time to ensure if at a later date a FAFSA is completed, eligibility for remaining aid is factoring in such other institutional resources. If a student is not enrolled and the request is not for compensation, a Non Service Pay Authorization Request should be completed.

Select the Type of Authorization You Would Like to Submit

If you have access to the site you may go to the entry screen for the type of authorization you would like to enter by clicking below

Enter Scholarship Authorizations

Enter Waiver Authorizations

Access to Submit an Authorization

To obtain access to the secured authorization sites, please **submit your request**. It is the responsibility of the awarding department to ensure that the person listed on the authorization request has expenditure authority for the budget-project.

3. After selecting which database you would like to access, a log in screen will appear. You will use your network ID and password. Once you have logged in, you will see the "Administration" page, where you can select "Enter Departmental Scholarship Authorizations"

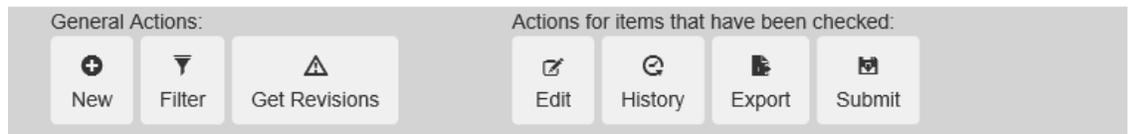
Log in

Please sign in with your WSU Network ID

Network ID	<input type="text" value="Steven.Julian"/>
Password	<input type="password" value="....."/>
	<input type="button" value="Log in"/>

4. Once you are logged in, you should see the home screen for departmental scholarship authorizations. Here you will be able to create and submit an authorization, edit a previously submitted authorization, and look at the history of previously submitted authorizations.

Scholarship Authorizations



Submitting a New Scholarship Authorization

Each departmental user can submit one SARAS authorization, for each award, for an aid year, for an individual student. Once an authorization is submitted, you will need to submit a change to the authorization to update it.

1. When entering a new authorization, you will want to enter the student's ID Number and hit tab to recall the student's information.
2. After you enter the budget and project numbers, the scholarship name should appear in the drop down menu. Please note that if the name of the scholarship does not appear, then you may need to request a new item type by pushing the "Request new item type" button. This will take you to a new screen, so please make sure your pop up blocker is not preventing it from opening.
3. Continue to fill out the required information providing information for what enrollment status is required for the scholarship, which aid year and term the money should be disbursed to.

Add Scholarship Authorization ✕

Keep authorization details on form (will only work with 'Save and Continue')

After entering values in the WSUID and Expenditure Authority NID fields press Tab to populate associated fields

WSUID

First Name Last Name

Budget Project

Scholarship Name Request New Item Type

Enrollment Condition Award Year

Fall Amount

Spring Amount

Summer Amount

Expenditure Authority NID Authorizing Email

Authorization Date

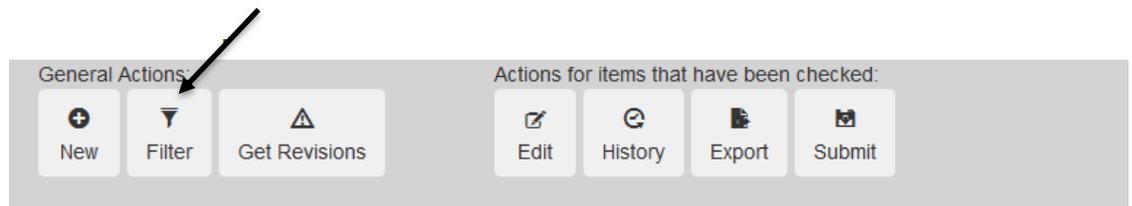
Instructions

4. After you have input the data, the authorization is saved in a created status. It will need to be “submitted” to Student Financial Services, or else it will not be processed.
5. To submit the record, you will need to select the check box of an authorization in a “created” or “revised” status. After checking the box(es) for the authorizations you would like to submit, you will then click the submit button found at the top row of SARAS.

General Actions: Actions for items that have been checked:

Finding your Scholarship Authorizations

1. In order to make an edit, or to view the history on your award, you need to locate the award. Currently when you log in, all of the scholarship authorizations you have entered will appear. You can sort through these by using the filters located in the top buttons.



- The screen that pops up next will allow you to filter by status, award year, WSU ID or the budget and project of the awards.

Filter Settings ×

Status ▾

Award Year ▾

WSUID

Budget Project

Information about the SARAS authorization

1. Vocabulary –

Status	
Created	This means your authorization was created and is ready to be sent to SFS but has not been submitted.
Submitted	SFS has received your scholarship authorization but has not processed it yet.
Posted	The scholarship authorization has been processed by SFS.
Revised	SFS has returned your scholarship authorization for a clarification. This authorization will need to be re-submitted to SFS.

Enrollment Conditions	
Any	The student must be enrolled in at least 1 credit, unless otherwise noted in the “instructions section”
Part-time	Student needs to be enrolled in at least 6 credits to receive the scholarship.
Full-time	Student needs to be enrolled in at least 12 credits to receive the scholarship.

- a. Authorization date – This the day the authorization was originated. If the authorization date is manually changed when the authorization is created, then this is the day the system will deliver the scholarship authorization to SFS
- b. Status Date – This is the day the status of the scholarship authorization was last changed. This can happen when an award is submitted, posted, or revised.
- c. Instructions – The instructions section of the scholarship authorization is a place for the departmental user to put notes.

2. History

- a. Navigation – Once you have found the scholarship authorization you want to view the history on, you can select the checkbox to the left of the authorization and then select “history” in the top buttons.

Scholarship Authorizations

General Actions:				Actions for items that have been checked:			
New	Filter	Get Revisions		Edit	History	Export	Submit

WSUID	Student Name	Budget	Project	Scholarship Name	Enrollment Condition	Award Year	Fall Amount
<input type="checkbox"/>		2135	3983	APPAREL, MERCH & INTER. DESIGN	Full-Time	2016-17	200

- b. What to look for – Any edits you make will show up as a new line in the history box. You will want to look at the status date for an understanding of when it was last touched. Below, we can see there was an edit was made to this scholarship authorization on October 25th. An edit does change the status, so it will continue to read as “posted” but SFS will need to “post” the award again to remove it from their queue. On November 1, this award was “posted” again.

Authorization Date	Instructions	Status	Status Date
<input type="checkbox"/> September 8, 2016		Created	September 8, 2016
<input type="checkbox"/> September 8, 2016		Submitted	September 8, 2016
<input type="checkbox"/> September 8, 2016		Posted	September 19, 2016
<input type="checkbox"/> September 8, 2016		Posted	October 25, 2016
<input type="checkbox"/> September 8, 2016		Posted	November 1, 2016

Revisions from SFS

You will receive an email notification if a Scholarship Authorization is sent back to you with a request for a change or a clarification. When you log into SARAS and have revisions, you will also see a notification pop up when you open your Scholarship Authorizations page:

“You have authorization(s) that require a revision and need to be re-submitted. Use the 'Get Revisions' button to view these authorization(s). The 'Counselor Notes' field should contain instructions for what needs to be changed. After completing revisions you must re-submit these authorizations to be processed. After all revisions have been made, you may return to your normal filter view by selecting the 'Filter' button then choose 'Re-load Defaults'.”

1. If you want to “Get Revisions” to look at the scholarship authorizations that were submitted back to you, you can click “get revisions” or filter by the revised status. If you wish to remove all filters, please click reload defaults.
2. You will need to look at the “counselor notes” to determine what the clarification is. Examples of this could be to put a note regarding the enrollment condition, or moving the award to a different term.
3. Once you have completed the changes, you **HAVE TO** submit the scholarship authorization back to Student Financial Services.

Editing or cancelling an already submitted authorization

If a student's award needs to be changed or cancelled and you as the user are initiating these changes, then you will submit an "edit" to the scholarship authorization. This is completed from the Scholarship Authorizations page.

1. On the far left side of the screen, you will see a checkbox; use this checkbox to select the award you want to edit, then press the edit button.

Scholarship Authorizations

General Actions: New Filter

Actions for items that have been checked: Edit History Export Submit

Last Command Result: [Empty text box]

Check All

WSUID	Student Name	Budget	Project	Scholarship Name	Enrollment Condition	Award Year	Fall Amount	Spring Amount	Summer Amount	Expenditure Authority	Expenditure Authority Email	Authorization Date	Instructions	Current Status
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2. Once you have completed the edit, you will save the changes. You do not need to "submit" the changes to the authorization because a save will automatically submit the authorization change to SFS.

WSUID

First Name: [Text Box] Last Name: [Text Box]

Budget: [Text Box] Project: [Text Box]

Scholarship Name: [Text Box]

Enrollment Condition: Full-Time Award Year: 2016-17

Fall Amount: \$ 200 .00

Spring Amount: \$ 0 .00

Summer Amount: \$ 0 .00

Expenditure Authority NID: [Text Box] Authorizing Email: [Text Box]

Authorization Date: 9/8/2016

Instructions: Entered by Steven Julian

Save Cancel

3. A change to an authorization that was not a revision does not need to be re-submitted. A save will generate a notification for Student Financial Services.

Things to know

If a student is already fully awarded up to their cost of attendance, and you submit a scholarship for them, it is highly likely that the scholarship will reduce the student's financial aid package.

Each student can only have one SARAS , for each award, being submitted from an individual departmental user. Once an authorization is submitted, you will need to submit a change to the authorization to update it.

Summer Awards

- Summer is a trailing term for our academic year.
- Full time during the summer is considered at 6 credits.
 - For ease, please use the instructions section to identify if there is a credit requirement for students who are being submitted through as “part time.”
- If a student does not need to be enrolled to receive the funds, please identify that through the instructions section as well.