**Procedures for Preparing Scholarship and Grant Authorization (SAG) and Scholarship and Grant Decrease Authorization (SAGD) Forms**

**Who needs to complete the SAG or SAGD forms?**

A department that has awarded a scholarship should prepare the Scholarship and Grant Authorization (SAG) form and submit to the Financial Aid Office so the funds can be posted to the student’s UK account. If you submitted the SAG form for payment and need to decrease the award you should complete and submit a Scholarship and Grant Decrease Authorization (SAGD) form.

If you are a department that enters your scholarship awards in ProSAM, the financial aid system, you do not need to complete the SAG or SAGD forms.

**Steps to complete the SAG form.**

Due to the requirements of Campus Management (CM) changes were made to the SAG form so the department could provide the information necessary to process the award(s) in ProSAM and CM to the Financial Aid Office. The revised SAG form can be found on the UK eforms site at <http://www.uky.edu/eForms/>. Please use the revised form for all future submissions.

The following fields must be completed on the attached copy of the SAG form in order for the Financial Aid Office to process the awards in ProSAM. Failure to provide this information will result in a processing delay.

**DATE SUBMITTED \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

\*Enter the date you are submitting the form to the Financial Aid Office

**SCHOOL TERM FOR DISBURSEMENT OF AID (write the year in only one space)**

**Yr.\_\_\_\_ Fall Semester Yr.\_\_\_ 4-week Summer**

**Yr.\_\_\_\_ Spring Semester Yr.\_\_\_ 8-week Summer**

**Yr.\_\_\_\_ Fall Only**

\*Enter the year you are paying the award.

\*If the award is for fall and will not be repeated in spring enter the year in the *Fall Only* field.

\*If the award is for fall and spring you should submit a separate SAG form for each term.

**CAMPUS (where student is enrolled)**

**□ UK □ MEDICINE □ DENTISTRY**

\* Check the campus where the student is enrolled

**GRANT OR SCHOLARSHIP TITLE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

\*Enter the grant or scholarship title. When setting up the information for ProSAM the Financial Aid Office will use the title to identify the award in ProSAM and the student will see the title when reviewing their awards on myUK.

**DEPARTMENTAL AUTHORIZING SIGNATURE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

\*If you do not have authorization to release the awards please have the individual authorizing release complete this field. If you are submitting the SAG form via email the name can be typed in this field.

**FORM PREPARED BY:**

**NAME**

**COLLEGE**

**DEPARTMENT NAME**

**DEPARTMENT NUMBER**

**ADDRESS & SPEED SORT**

**PHONE NUMBER**

**E-MAIL ADDRESS**

\*All fields in this section must be completed as the Financial Aid Office relies on the contact information if there are questions and/or to communicate processing deadlines, etc. to the department.

**Fund: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Funds Center: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Business Area: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Functional Area: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**WBS Element: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**GL Account: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**This award is a (mark only one):**

**□ Scholarship □ Grant**

**□ Loan □ Other (specify)**

**The recipient is selected by (mark only one):**

**□ College □ State Entity**

**□ Department □ Private Entity**

**□ Federal Entity □ Other (specify)**

\*If you do not have this information consult your budget officer and/or SAP using transaction zfi\_cobj. This transaction is very useful to determine the above requested information.

\*If you are using a WBS Element also include the Funds Center. When using a WBS Element the GL Account should be 537030 if it is a Budget Rule 4 because you are paying the award(s) using a SAG form.

\*If you are not using a WBS Element use any of the following GL Accounts. 537050(undergraduate), 537060(graduate) or 537100(tuition waiver)

\*Prior to submitting the SAG form to the Financial Aid Office you must confirm that there are funds in the GL Account you have listed.

**STUDENT ID NO. NAME (last, first, middle init.) SPECIAL AMOUNT DATE (SFA ONLY)**

**1**

**2**

**3.**

**PAGE TOTAL \_\_\_\_\_\_\_\_\_\_\_\_ TOTAL STUDENTS**

**GRAND TOTAL \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_**

\*Only the student’s UK id number can be used. Please do not list the student’s social security number.

\*Special Column: if you know the student is not enrolled or is enrolled in a zero hour program and you still want to pay the student indicate NE (not enrolled) or 0 (zero hour) in the special column. Any other brief information may be indicated there such as if you are submitting another SAG form to pay the student additional funds.

\*DATE (SFA ONLY) Column: After the award has posted to ProSAM and the student’s UK account the Financial Aid Office will list the date the award posted.

If you are submitting the SAG form via email please send the form to Christina Jones at cnjone2@uky.edu. \*\*This is the Financial Aid Office’s preferred method of submitting SAG forms.

If you are submitting the SAG form via fax, campus mail or hand delivery, 2 copies should be submitted at the same time. Once the awards have posted to the student’s UK account 1 copy of the SAG form will be returned. The Financial Aid Office will maintain the other copy for its records. If all awards are posted the SAG form will have a posted date by each student listed and a solid diagonal line. If a few or none of the awards have posted the SAG form will have a broken diagonal line. When the SAG form is returned with a broken diagonal line it usually means the student is not enrolled/withdrew prior to posting. If that is the case the Financial Aid Office will be able to indicate why the award did not post. The Financial Aid Office will make every effort to contact the department to determine if the award should still post in those cases. If unable to make contact the form will be returned. If the department determines the student should still be paid a new SAG form should be completed and submitted along with a notation that the student should be paid.

**Steps to complete the SAGD form.**

Due to the requirements of Campus Management (CM) changes were made to the SAG form so the department could provide the information necessary to process the award(s) in ProSAM and CM to the Financial Aid Office. The revised SAGD form can be found on the UK eforms site at <http://www.uky.edu/eForms/>. Please use the revised form for all future submissions.

The SAGD form should be used if the department has submitted a SAG form to the Financial Aid Office but has since determined the student is not eligible for the either all or part of the award. The Financial Aid Office will use the SAGD information to debit the award from the student’s UK account.

**Please keep in mind.....It is the department’s responsibility to notify the student(s) listed on the SAGD form of a reduction or cancellation of their award. A reduction or cancellation of the award could create a balance owed on the student’s UK account. The student will be assessed late fee charges unless the balance is paid in full prior to the next billing cycle.**

**DATE SUBMITTED \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

\*Enter the date you are submitting the form to the Financial Aid Office

**CAMPUS (where student is enrolled)**

**□ UK □ MEDICINE □ DENTISTRY**

\* Check the campus where the student is enrolled

**SCHOOL TERM FOR WHICH THE STUDENT ACCOUNT(S) WAS CREDITED.**

**YR.\_\_\_\_ Fall YR.\_\_\_ 4-week Summer**

**YR.\_\_\_\_ Spring YR.\_\_\_ 8-week Summer**

\*Enter the year where the award should be reduced or canceled.

\*If the cancellation or reduction is for both fall and spring submit a separate SAGD form for each term.

**FORM PREPARED FOR/BY:**

**NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**DEPARTMENT \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**CAMPUS ADDRESS \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**SPEED SORT \_\_\_\_\_\_\_\_\_\_\_\_\_ PHONE \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

\*All fields in this section must be completed as the Financial Aid Office relies on this contact information if we have questions and to return the processed SAGD form to the department.

**GRANT OR SCHOLARSHIP TITLE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

\*Enter the grant or scholarship title. This should mirror the information entered on the SAG form that was submitted to the Financial Aid Office.

**FUNDS CENTER OR WBS ELEMENT**

\*This information allows the Financial Aid Office to confirm we are reducing or cancelling the award from the appropriate fund.

**DEPARTMENT AUTHORIZED SIGNATURE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

\*If you do not have authorization to reduce or cancel the awards please have the individual authorizing the reduction or cancellation complete this field. If you are submitting the SAGD form via email the name cannot be typed in this field. You must submit a signature.

**STUDENT ID NO. NAME (last, first, middle) AMOUNT**

\*Only the student’s UK id number can be used. Please do not list the student’s social security number.

\*In the amount field if the award is a reduction, the department should indicate the amount that should be removed from the posted award. If the entire amount should be cancelled the department should indicate that amount.

If you are submitting the SAGD form via email please send the form to Christina Jones at cnjone2@uky.edu. \*\*This is the Financial Aid Office’s preferred method of submitting SAGD forms.

If you are submitting the SAGD form via fax, campus mail or hand delivery, 2 copies should be submitted at the same time. Once the awards have posted to the student’s UK account 1 copy of the SAGD form will be returned. The Financial Aid Office will maintain the other copy for its records. When the reduction or cancellation has posted the SAGD form will have a posted date in the SFA USE ONLY box and a solid diagonal line. If the department later determines the student should receive the award a new SAG form should be completed and submitted along with an indication the student should be paid.

**Other SAG and SAGD form processing reminders:**

-If a SAG or SAGD form is submitted to the Financial Aid Office with incorrect or missing information the Financial Aid Office will first try to contact the form preparer by email or phone in an effort to obtain the correct information. If unable to obtain the information the SAG or SAGD will be returned via campus mail indicating the form was not processed and must be corrected then resubmitted to the Financial Aid Office.

-It is the department’s responsibility to verify funds are available in the Funds Center or WBS Element under the appropriate GL Account prior to submitting the form to the Financial Aid Office. If a WBS Element the GL Account must be 537030 since a SAG form is being used to pay the student.

-It is also the department’s responsibility to verify the Funds Center or WBS Element has not expired. If you have a Funds Center or WBS Element that expire on June 30th of the year, all SAG and SAGD forms should be submitted to the Financial Aid Office no later than June 10th.  This allows the Financial Aid Office time to post the award(s) by June 30th.

- It is the responsibility of the department to submit a timely SAG form to prevent late fee assessments on the student’s UK account. If the department wishes to appeal a late fee assessment they should contact the Office of Student Account Services at 257-3406.

-The Office of Student Account Services can also provide accurate information regarding a student’s account balance, late fee amounts and incorrect charges on the student’s UK account.

-The Financial Aid Office is responsible for processing the SAG and SAGD forms. The Financial Aid Office confirms the award has processed in ProSAM and posted to the student’s UK account. At this point the Financial Aid Office will mark the processed SAG and/or SAGD form and return to the department via campus mail. The department’s receipt of the processed SAG and/or SAGD form should be their indication to confirm the funds applied correctly to their Funds Center or WBS Element in SAP so they can reconcile. If the department has questions regarding the posting of the awards to the Funds Center or WBS Element in SAP they should contact their budget officer for assistance.

-The student can verify payment of the SAG award by checking myUK. The student can also view all their financial aid information and check the balance of their UK account. If the student has general financial aid questions, not related to SAG forms, they can call the Financial Aid Office at 257-3172. If the student contacts the Financial Aid Office regarding a SAG form award and the SAG form has not be submitted to the Financial Aid Office they will be referred to the department that is making the award. It is important the SAG and SAGD forms are submitted to the Financial Aid Office in a timely manner.

-Throughout the year the Financial Aid Office will send emails indicating dates to submit the SAG forms to the Financial Aid Office. It is important that the department take all action necessary to meet those dates so the departmental award can be reflected in the student’s award notification package. This will help to minimize the possibility of the student’s awards exceeding his/her cost of attendance and creating an overaward which requires the Financial Aid Office to decrease or cancel one or more awards in the student’s aid package.

**Signature Requirements for SAG and SAG D Forms:**

* **When submitting a SAG form via campus mail or hand delivery:**

***The Departmental Authorizing Signature line must contain a wet signature.*** A wet signature is an original signature handwritten with a pen in ink. The Departmental Authorizing Signature line cannot be typed or left empty.

* **When submitting a SAG form via Fax:**

***The Departmental Authorizing Signature line must contain an original signature.*** Since a fax is a copy of the original form you have, the signature does not have to be a “wet signature.” The faxed version should be a copy of a form with a wet signature. The Departmental Authorizing Signature line cannot be typed or left empty.

* **When Submitting a SAG via Email:**

***The Departmental Authorizing Signature line must contain a signature. We cannot accept a typed signature.*** It should still be the name of the person in your department who authorizes SAG payments and not just the preparer’s name. If the preparer is also authorized to release these funds for the department, then having the same name on the Departmental Authorizing Signature line and in the preparer’s information is acceptable.