

SUNY Oswego ORSP "HOW-TO DOCUMENT"

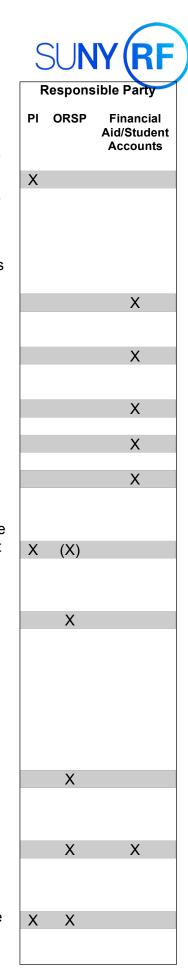
What steps are taken when your sponsored program/contract includes support for scholarships?

Summary

Awarded sponsored programs (grants)/contracts that include funds to support scholarships for students require significant coordination and communication amongst the Principal Investigator (PI), Office of Research and Sponsored Programs (ORSP), Office of Student Accounts, and Office of Financial Aid to ensure proper assignation of scholarships funds to students and costs to the appropriate award/contract account(s). The process for scholarship support described below must be implemented each academic period (fall, winter, spring, and/or summer) that is supported by the awarded grant/contract.

Process

		Responsible Party		ible Party
1)	PI and ORSP will confirm sponsor's guidelines for payment type,	PI	ORSP	Financial Aid/Student Accounts
,	timing of scholarship distribution, and eligibility qualifiers.	Х	Х	
2)	PI will meet with ORSP to review the information above and plan implementation of scholarships.	Х	Х	
3)	ORSP will inform the SUNY Oswego Office of Financial Aid and Office of Student Accounts of sponsored program award and communicate start and end dates of the award.			
			Х	
4)	PI will meet with scholarship candidates, confirm eligibility, and compile a list of awardees.	Х		
5)	PI will provide a list of awardee names, campus ID#, and qualifying data to ORSP.	Х		
6)	ORSP will send awardee list and pertinent award information to the Office of Financial Aid and Office of Student Accounts.		Х	
7)	PI will also complete and sign an ORSP requisition form at this time to initiate the payment process.	Х		
8)	ORSP will review and request any additional information, if necessary, from PI to adequately document candidate qualifications for the particular scholarship.		Х	



- 9) PI will periodically monitor student scholar participation and eligibility status (financial, academic, or otherwise), as described in the awarded grant proposal and sponsor guidelines. PI will notify ORSP, Office of Financial Aid, and Office of Student Accounts of any student scholars falling out of eligibility status.
- 10) The Office of Student Accounts will credit individual student scholar's semester billing and send an invoice for the group of student scholars to ORSP approximately <u>mid-way through the academic</u> <u>period of scholarship support</u> (includes fall, winter, spring, and summer).
 - a. Invoice needs to be on SUNY Oswego department letterhead.
 - Invoice needs to include a list of recipients' names, awarded amount, and semester of award for crosschecking to original awardee list provided by PI.
 - c. Invoice needs to state to whom the check is made payable.
 - d. Invoice needs to be signed by authorized person in the Office of Student Accounts.
- 11)PI will provide ORSP with written confirmation indicating the awardee list and the amounts due are accurate. If there are any changes that need to be made, ORSP will request amended invoice from the Office of Student Accounts.
- 12) ORSP will process Research Foundation payment from the designated grant/contract fund account.

IMPORTANT NOTE: The procedure described above must be followed each academic period that includes financial consideration supported by a grant or contract.

- 13) <u>Six months prior</u> to the end date of awarded grant/contract, ORSP will remind the PI, Office of Financial Aid, and Office of Student Accounts of the award termination date.
- 14) <u>One month prior</u> to the end date of awarded grant/contract, ORSP will request from the Office of Student Accounts any outstanding invoices (current/past).
- 15) ORSP will process the final Research Foundation payment from the designated grant/contract fund account and work with PI to complete and submit appropriate financial closeout and final report documentation.



Contact Information

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