

Entering Awards



Entering a Single UGF

1. Select “Manage RA/TA/UGF Awards” tile
2. Find student using “Search Grad Financial” screen

There are three options for searching:

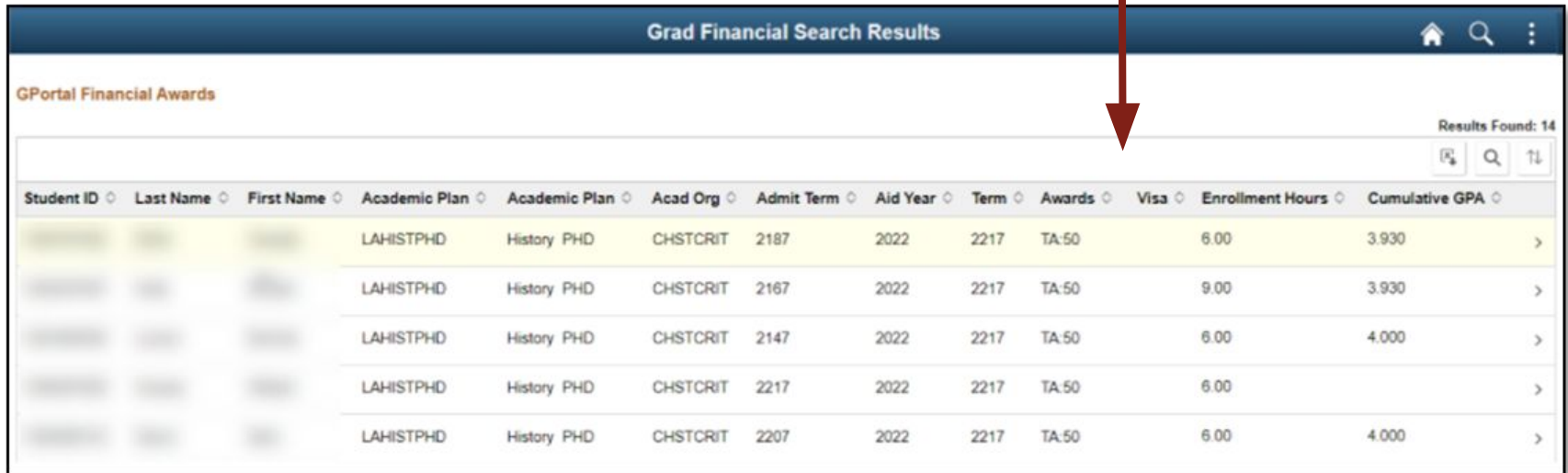
- Search by Student ID (EMPL ID)
- Search by Name (you will need a minimum of 2 characters for each field - first and last name)
- Advanced Search*, which enables you to search by Award term and any two of the additional fields listed.

**You can use the magnifying glass at the end of any of these rows to locate the proper entry for that field*

A screenshot of a web application interface titled "Search Grad Financial" in a dark blue header. The interface is divided into three search sections. The first section, "Search by Emplid (Student ID)", has a text input field for "Student ID". The second section, "Search by Student Name (enter a minimum of 2 characters in first and last name)", has two text input fields for "Last Name" and "First Name", each with "(begins with)" to its right. The third section, "Search by Degree Program and Award Status (enter at least 3 criteria / Award Term is required)", has several rows of search criteria: "Academic Program", "Academic Plan", "Academic Organization", "Admit Term", "Award Term", "Award Type" (a dropdown menu set to "All Awards"), and "Active Status" (a dropdown menu set to "Active Only"). Each of these rows has a magnifying glass icon at the end of its input field. At the bottom of the form are four buttons: "Search" (green), "Save Search", "Clear All", and "Return to Homepage" (grey).

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If your results had multiple students (ex. a search for “Ji Li” might yield multiple students), simply find the correct student & click on their row



The screenshot displays the 'Grad Financial Search Results' interface. At the top, there is a dark blue header with the title 'Grad Financial Search Results' and navigation icons (home, search, and menu). Below the header, the page title 'GPortal Financial Awards' is visible. On the right side, it indicates 'Results Found: 14'. A table with 13 columns is shown, with the first row highlighted in yellow. A red arrow points to this first row. The columns are: Student ID, Last Name, First Name, Academic Plan, Academic Plan, Acad Org, Admit Term, Aid Year, Term, Awards, Visa, Enrollment Hours, and Cumulative GPA. Each row ends with a right-pointing chevron icon.

Student ID	Last Name	First Name	Academic Plan	Academic Plan	Acad Org	Admit Term	Aid Year	Term	Awards	Visa	Enrollment Hours	Cumulative GPA
			LAHISTPHD	History PHD	CHSTCRIT	2187	2022	2217	TA-50		6.00	3.930
			LAHISTPHD	History PHD	CHSTCRIT	2167	2022	2217	TA-50		9.00	3.930
			LAHISTPHD	History PHD	CHSTCRIT	2147	2022	2217	TA-50		6.00	4.000
			LAHISTPHD	History PHD	CHSTCRIT	2217	2022	2217	TA-50		6.00	
			LAHISTPHD	History PHD	CHSTCRIT	2207	2022	2217	TA-50		6.00	4.000

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3. A **new tab** should open with the “Financial Detail” screen for the student you are working on and you will click “UGF Summary” from the menu on the left side of this screen



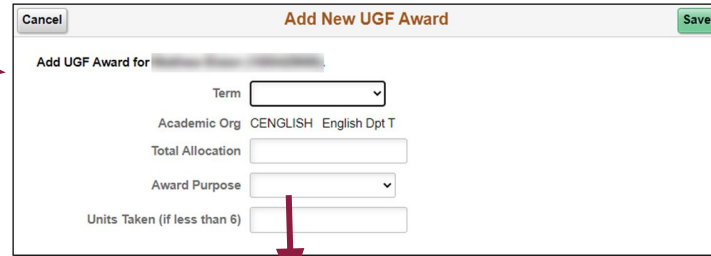
4. On the “UGF Summary” page, you will click the “Add UGF Award” button



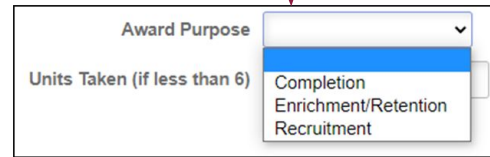
NOTE: *Pop-up Blocker must be off, or your student pages will not open.*

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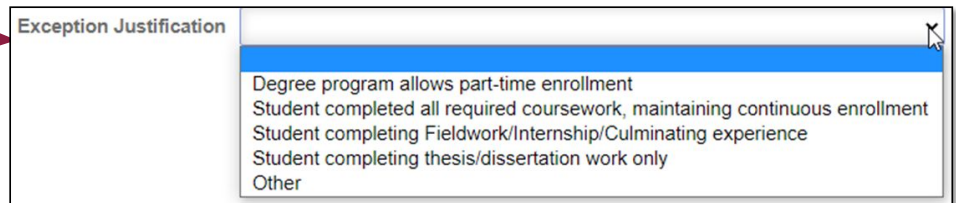
5. Enter required award info:
Term, Total Allocation and
Purpose (Recruitment,
Enrichment/Retention, or
Completion)



Note: If the student will be/is enrolled
in <6 units for the awarded term,
please enter # of units and you will
then be prompted to enter an
“Exception Justification” from the
dropdown menu



You will only see this if you enter a # of units taken



6. Press the “Save” button

Entering a Single RA/TA Award



Use the same processes to get to the “Add Award” button that we just demonstrated for the UGF, but for “RA/TA Award”

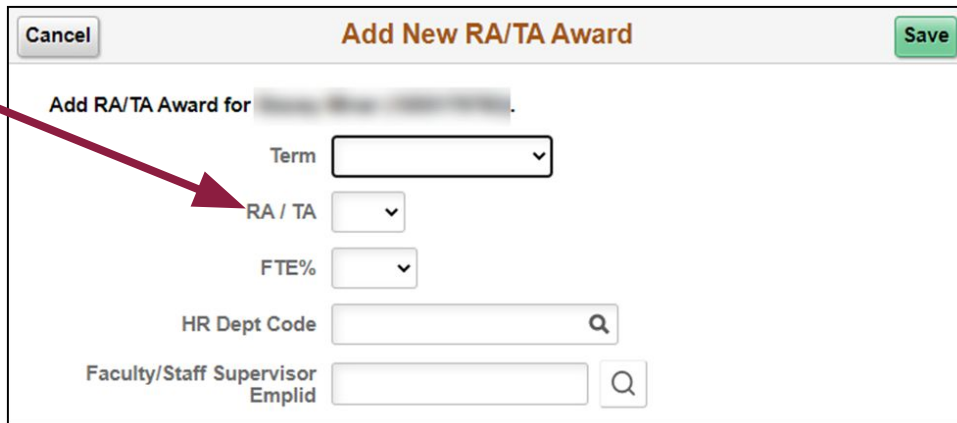
Entering a Single RA/TA Award

5. Enter required award info:
Term, Position type (RA or TA), FTE
%, Dept Code & Supervisor's ID

Note: FTE% will only allow 25% or 50%

REMINDER: There are no exceptions to the enrollment minimum for RA/TA Awards - students must be enrolled in **at least 6** units for the awarded term as a condition of the appointment.

6. Press the "Save" button



Cancel Add New RA/TA Award Save

Add RA/TA Award for [Redacted]

Term [Dropdown]

RA / TA [Dropdown]

FTE% [Dropdown]

HR Dept Code [Text] [Search]

Faculty/Staff Supervisor Emplid [Text] [Search]

Entering Multiple UGF Awards

1. Select “UGF Quick Entry” tile on Homepage
2. You must enter a “static” Term and Academic Org in the UGF Default section for all entries
3. Then you can enter as many individual student awards as you need - just click the “+” sign for more lines
4. Click “Submit”



If you will be entering many awards or you need to stop & check on something, we encourage you to use the “Save Draft” button as you go

UGF Quick Entry

The UGF Quick Entry page enables you to rapidly add multiple new awards. This page is used for new awards only; editing of existing awards to increase or decrease amount must be done through the Manage RA/TA/UGF menu. You should periodically save your work by clicking on **Save Draft**, when finished entering all awards, click **Submit** and then check for errors.

UGF Default

Term

Academic Org

Allocation Remaining

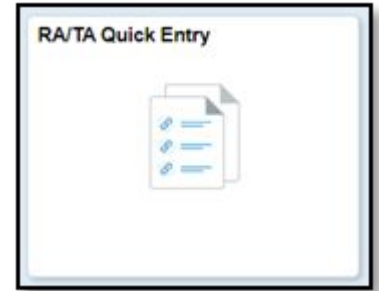
Awards Pending \$0

Enter UGF Awards

Student ID	Student Name	Term	Academic Org	Total Award	Offer Purpose	Enrolled Hours	Exception Justification		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Q"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Entering Multiple RA/TA Awards

1. Select “RA/TA Quick Entry” tile on Homepage
2. You will need to enter a “static” Term, Start Date and HR Department Code which will auto-populate this for all entries (but can be overridden on an individual line entry)
NOTE: Start Date field not required for Summer terms
3. Then you can enter as many individual student awards as you need - just click the “+” sign for more lines
4. Click “Submit” (or “Save Draft” if you’ll come back to finish)



RA/TA Quick Entry

The RA/TA Quick Entry page enables you to rapidly add multiple new awards. This page is used for new awards only; editing of existing awards to must be done through the Manage RA/TA/UGF menu. You should periodically save your work by clicking on **Save Draft**, when finished entering all awards, click **Submit** and then check for errors.

RA/TA Default

Term Start Date HR Dept Code

Enter Awards

Student ID	Student Name	Term	RA/TA	*FTE%	HR Dept Code	Supervisor ID	Name	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> + -

Checking Status of an Award

After you've entered awards (individual or multi), there are two ways to see where they are "in the process":

1. On an individual students' "Summary" page for that award



UGF Summary

Financial Detail

RA/TA Summary

UGF Summary

Award Approval History

Name [Redacted]
Plan: History (PHD)
Acad Org: Historical, Philosophical & Religious Studies, Sch
Admit Term: 2020 Fall

UGF Assignment

[Add UGF Award](#)

Term	Allocation	Award Purpose	Academic Org	Action Date	Seq	Active	User ID	Approval Status	
2227	\$75.00	Completion	Hist, Phil & Rel Studies	02/09/2022	1	Active	anharvey	Pending 1st Approval	>
2211	\$662.00	Enrichment/Retention	Hist, Phil & Rel Studies	03/19/2021	1	Active	mbarrios		>
2207	\$1,200.00	Recruitment	Hist, Phil & Rel Studies	07/04/2020	1	Active	mbarrios		>

Checking Status of an Award

After you've entered awards (individual or multi), there are two ways to see where they are "in the process":

2. In the "My Inbox" section, there is an "Approval History" section that is searchable

The screenshot displays the 'Approval History' interface. A red arrow points to the 'Approval History' link in the left sidebar. The main content area shows search filters for Award Type (All Awards), Approval Status, Academic Org, Student ID, Start Date (01/29/2022), and End Date (03/01/2022). Below the filters is an 'Approval Summary' table with 84 records found. The table columns include Student ID, Student Name, Academic Plan, Term, Award, Last Action, Updated By, Updated Date Time, and Details.

Student ID	Student Name	Academic Plan	Term	Award	Last Action	Updated By	Updated Date Time	Details
		LALINPHD	2221	RA/DeptID.A0101001 - 25%	Approved		02/15/22 3:44:01PM	Details
		LAENEDMA	2221	RA/DeptID.B1750001 - 25%	Reject		02/15/22 3:50:13PM	Details
		LAENEDMA	2227	UGF/AcadOrg.CENGLISH - \$300	Approved		02/17/22 2:59:25PM	Details
		LAENEDMA	2227	RA/DeptID.B0109001 - 50%	Reject		02/15/22 3:51:35PM	Details
		LAENGLMA	2221	RA/DeptID.B1705 - 25%	Approved		02/18/22 1:50:33PM	Details