



## How to Submit a Scholarship Award Form in DocuSign

1. Navigate to <https://www.docusign.com/> and log in with your UCA credentials. (If you do not have a DocuSign account, submit a DocuSign Account Request form [HERE.](#))
2. Click the “Templates” tab at the top of the page
3. Select the “Shared with Me” button, then click “Use” on the Scholarship Award Form template.

*\*Detailed instructions on how to locate the Scholarship Award Form template in DocuSign can be found at <https://uca.edu/compliance/> under the “Forms” tab.*

### Initiator

The initiator will complete the informational section at the top of the form, along with the award information for each student. Please avoid using nicknames and ensure that the student ID and student name match the official information in Banner to avoid any processing errors.

For scholarship reductions, an initial award amount must be entered into the award cell, with the actual reduction being entered as a negative number in the adjustment cell. The formula in the last column will use this data to calculate the new award amount.

To expedite processing, ensure that the compliance office has the documentation required to confirm eligibility. If your department uses a Google drive folder to store this information, please grant view only access to [finadmincompliance@uca.edu](mailto:finadmincompliance@uca.edu). We ask that you do not attach non-essential documentation to the DocuSign envelope, as this may cause confusion during the routing and approval process. If additional documentation is needed, please email it directly to the compliance email address.

### Authorizing Individual

The authorizing individual will review the information provided by the initiator. If an error is found during this review, the authorizer has the ability to override certain cells within the document. Specifically, the authorizer can make changes to the following fields:

- Department
- Contact Phone
- Authorizing Individual & Title
- Name/Purpose of Scholarship/Award
- Scholarship Fund Code
- Student Name
- UCA ID
- Term



The authorizer may also “Decline to Sign” the document if significant changes are required. However, choosing this option will void the entire document and will require a new envelope to be created. The authorizer may choose instead to contact the initiator directly to explain what corrections are needed and simply wait until the changes are made before signing the document.

After the authorizer has provided a signature, the form will route to the compliance office for review.

#### Compliance Office (CO)

The Compliance office will perform a thorough review of the awards to confirm eligibility. If additional information is needed, the CO staff will contact the initiator and/or authorizing individual listed on the form to obtain this information.

If a student is found to be ineligible, the CO staff will notify the initiator and/or authorizing individual directly and request that the student be removed from the award form. After the initiator has made the necessary changes, the CO staff will provide a signature and the form will route to Financial Aid for processing.

#### Office of Student Financial Aid (FinAid)

The Financial Aid office will review each award according to financial aid rules and regulations. After FinAid has completed its review, the awards will be posted to Banner exactly as they are shown on the award form. Financial Aid will then provide a signature and a copy of the completed form will be sent to the initiator, authorizing individual, and the compliance office.

If FinAid finds that a student is ineligible, the FinAid office will notify the Compliance office directly before taking any action. If both FinAid and CO agree that a student is not eligible, the CO office will contact the initiator and/or authorizing individual to request that the student be removed from the form. After the initiator has made the requested changes, the Financial Aid office will provide a signature.