

SBF REQUISITIONS FOR SCHOLARSHIPS, PRIZES OR AWARDS

REQUISITIONS FOR SCHOLARSHIP FUNDS

Key Call Out For all accounts that list Financial Need as one of the scholarship requirements, all potential candidates must be reviewed and approved by the Office of Financial Aid and Scholarship Services before the selection committee makes its final decisions and/or notifies students of their scholarships.

- **General Notes:**

- Account directors no longer need to submit multiple requisition forms for each scholarship or provide backup documentation. However, account directors must ensure that the department keeps a record of all documents in case these materials are needed for audit purposes.

- **SBF Requisition Form**

- Please use the SBF Requisition Form as the single confirming document for all scholarships awarded from your unit.
- In the "Item Information" section of the SBF Requisition Form, please:
 - Include the following language: *"Please see attached spreadsheet for (Name of Scholarships) scholarships. All students have met the scholarship criteria."*
 - Be sure to call out the name of the attached Student Aid Recipient excel spreadsheet.
 - In the "Total" box, enter the total dollars being awarded for all recipients.

- **Student Aid Recipient Spreadsheet**

- Scholarship recipients should be identified on the Student Aid Recipient spreadsheet. It is important to submit this in the form of an excel file (not as a PDF) as this information must be entered into the PeopleSoft system and is also used for generating links for student questionnaires.
- Key fields include: SBF account number, recipient first and last name, recipient's SOLAR ID, semester and year of scholarship, and scholarship amount.

- **Submitting Your Requisition:**

- The account director and/or the account signature should email the completed SBF Requisition Form and Student Aid Recipient Spreadsheet **directly to the Financial Aid Office** via their Stony Brook email account.
Emails should be sent to: Danielle.Steuer@stonybrook.edu and rantonianadrowski@stonybrook.edu

REQUISITIONS FOR PRIZE OR AWARD FUNDS

Students Awards should be submitted through the [AvidXchange](#) Platform

Key Call Out For all accounts that list Financial Need as one of the prize or award requirements, all potential candidates must be reviewed and approved by the Office of Financial Aid and Scholarship Services **before** the selection committee makes its final decisions and/or notifies students of their prize or award

○ **General Notes:**

- You will need to complete / submit a New Vendor Form and the student's **W-9 / W-8BEN** before entering the award in Avid so that the SBF staff can load the student into the platform.
- Account directors no longer need to submit backup documentation to justify the selection of the prize or award recipient. However, the account director will need to include a PDF of the **award letter** and the student's **W-9 / W-8BEN** form when submitting the award through Avid.
- Account directors must ensure that the department maintains records of all recipients in case these materials are needed for audit purposes.

○ **AvidXchange:**

- Please use the Avid platform for individual prizes or award recipients. Note: unlike scholarships, multiple recipients of prize or award funds cannot be combined in Avid, as these are taxable events for the student recipients.
- In the "Business Justification" section of Avid, please:
 - Include the following language: *"As per the selection committee's review, (student's name) best meets the prize or award criteria."*
 - Recipient's Solar ID / Semester and Award Year
- In the "Invoice Line Description" section, enter the name of the Award

○ **Student Aid Recipient Spreadsheet:**

- Prize and award recipients should be entered on the Student Aid Recipient spreadsheet.
- It is important to upload this excel file as a PDF in Avid. (excel will not load properly)
- As this information is used to generate links for student recipient questionnaires, please e-mail the actual excel spreadsheet to
 - Anne Schmitz, Senior Director of Donor Relations at anne.schmitz@stonybrook.edu
 - Donor Relations main email address: donor_relations@stonybrook.edu



ANNUAL QUESTIONNAIRE FOR STUDENT AID RECIPIENTS

Student recipients of donor-funded scholarships, prizes, awards or fellowships are required to submit an annual questionnaire that is distributed and managed by the Donor Relations team in the Advancement Office.

- These questionnaires are used to prepare important annual reports to donors to demonstrate the impact of their philanthropic commitments.
- Additionally, the information is used to make connections between donors and their recipients during the annual scholarship event each spring and allows us to make other connections between students and their donors throughout the year.
- Students will receive a unique link to submit their questionnaire via Qualtrics and will receive automatic reminders until they successfully complete their questionnaires.

If the Student Aid Recipient Spreadsheet was submitted via email with your SBF Requisition Form, then you do not need to send it again. Otherwise, units must submit the Student Aid Recipient Spreadsheet via excel with the names of all scholarship, prize, award and fellowship recipients by the following deadline:

- For fall only or fall/spring recipients: Spreadsheet must be received by no later than November 1.
- For spring only recipients: Spreadsheet must be received by no later than February 1.
- For summer recipients: Spreadsheet must be received no later than September 1.

For more information on the annual student aid recipient questionnaire, please contact Anne Schmitz, Senior Director of Donor Relations at anne.schmitz@stonybrook.edu.