

**Original Approval Date: December 13, 2019**
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**Parent Policy: [Student Financial Supports Policy](#)**

## Undergraduate Student Financial Supports Procedure

<b>Office of Administrative Responsibility:</b>	Office of the Registrar
<b>Approver:</b>	General Faculties Council
<b>Scope:</b>	<p>Compliance with this University policy extends to all academic, support and excluded staff, postdoctoral fellows, and academic colleagues as outlined and defined in the Recruitment Policy  <a href="https://policiesonline.ualberta.ca/policiesprocedures/policies/recruitment-policy.pdf">https://policiesonline.ualberta.ca/policiesprocedures/policies/recruitment-policy.pdf</a> (Appendix A  <a href="https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Recruitment-Policy-Appendix-A-Definition-and-Categories-of-Academic-Staff-Administrators-and-Colleagues.pdf">https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Recruitment-Policy-Appendix-A-Definition-and-Categories-of-Academic-Staff-Administrators-and-Colleagues.pdf</a>)                      and Appendix B  <a href="https://policiesonline.ualberta.ca/policiesprocedures/procedures/recruitment-policy-appendix-b-definition-and-categories-of-support-staff.pdf">https://policiesonline.ualberta.ca/policiesprocedures/procedures/recruitment-policy-appendix-b-definition-and-categories-of-support-staff.pdf</a>:                      Definitions and Categories); undergraduate, graduate and Faculty of Extension students; emeriti; members of the Board of Governors; visitors to campus, including visiting speakers and scholars; third party contractors; and volunteers.</p>

### Purpose

To provide information about undergraduate **student financial supports** at the University of Alberta.

The purpose of this procedure is to ensure consistency in fundamental student financial support practices and procedures across the institution, while allowing academic units sufficient flexibility to administer their student financial supports in a manner appropriate to their individual needs and objectives and in alignment with institutional objectives.

### PROCEDURE

#### 1. ADMINISTRATION

Merit-based student financial supports are normally administered by the Office of the Registrar (RO) as specified in the **terms of reference** of the student financial supports. Some recipients for merit-based student financial supports are nominated to the Office of the Registrar by Faculties, departments or groups on campus as specified in the terms of reference.

Need-based student financial supports are normally administered by the RO as specified in the terms of reference of the need-based student financial support.

Hybrid awards are normally administered by the RO as specified in the **terms of reference** of the hybrid awards. Some recipients for hybrid awards are nominated to the Office of the Registrar by Faculties, departments or groups on campus as specified in the terms of reference.

The RO will communicate with the Office of Advancement on recipient selection for donor funded student financial supports. The RO and the Office of Advancement will work collaboratively to ensure administrative procedures align with the original purpose of the student financial support.

Faculties, departments and other administrative units who are responsible for nominating recipients to the RO will administer selection practices that meet the eligibility and selection criteria outlined in the terms of reference of the student financial support. Nominating units will inform the RO when they have identified that selection criteria no longer support a diverse pool of eligible applicants or become too restrictive to allow the university to award the funds every year. The RO will work with the nominating unit and the Office of Advancement to explore options for changing the selection criteria to address the limitations.

The RO will coordinate with Financial Services as necessary to ensure proper financial management and disbursement of student financial supports.

## 2. MAINTENANCE OF TERMS OF REFERENCE FOR STUDENT FINANCIAL SUPPORTS

### A. GENERAL ELIGIBILITY

Student financial supports are tenable only at the University of Alberta unless otherwise stated in terms of reference. Student financial supports specific to a particular Faculty are generally tenable only in that Faculty.

### B. AMENDING TERMS OF REFERENCE

When terms of reference can no longer be satisfied, the University may amend the terms to best meet the original purpose of the financial support, while still ensuring that the benefit of such financial supports continues. For example, amendments to existing terms of reference may be necessary when there are no longer eligible students due to changes in University programming. Amendments to the general selection and eligibility criteria in terms of reference previously approved must be reapproved by the RO. The RO is responsible for monitoring student financial supports requiring amendment and will consult with the Office of Advancement and other stakeholders on campus as appropriate before making a change.

### C. ANNUAL VALUE SETTING

For donor funded student financial supports held by the RO, the RO will determine the annual value to be expended in consultation with the Office of Advancement.

For donor funded student financial supports held by Faculties, the Faculty will determine the annual value to be expended by the RO.

## 3. MERIT-BASED STUDENT FINANCIAL SUPPORTS

### A. SELECTION CRITERIA

Primary selection criteria for undergraduate merit-based student financial supports will be based on **undergraduate academic performance**. Secondary selection criteria may include, but are not limited to, community service, leadership, and experiential learning.

If selection cannot be made by applying both primary and secondary selection criteria, selection will be based on a combination of primary criteria and criteria that most closely fulfills the original purpose of the student financial support.

### B. ELIGIBILITY

Merit-based student financial supports established by the University will normally be available to meritorious students who have completed a minimum 24 credits over the most recent September to April period, unless otherwise specified in the terms of reference of the student financial support or the merit-based competition program.

#### C. DISBURSEMENT

Merit-based student financial supports are normally disbursed to the **student tuition account**. The first charge against any student financial support is to pay outstanding University fees including tuition, incidental fees and other university-related fees.

Merit-based student financial supports are normally payable only when students are in **full-time attendance** at the University in the term during which funds are disbursed. Merit-based student financial supports that are awarded prior to the commencement of or within the Fall Term will be divided evenly between the Fall Term and the Winter Term. The student financial support value will normally be prorated if the attendance of the student changes.

Merit-based student financial supports awarded to a convocating student at the time of convocation will normally be disbursed to the student's account following convocation.

#### D. MAJOR AWARD

In order that funds may be broadly distributed, a student may hold only one University of Alberta **major award** per category (leadership, academics, athletics) in any one year. The total value of merit-based student financial supports already received by students may be taken into consideration in selections for open award competitions.

#### E. ACADEMIC TRANSCRIPT

Merit-based student financial supports administered by the Office of the Registrar will be listed on the academic transcript. Need-based student financial supports and hybrid awards will not appear on the academic transcript.

### 4. NEED-BASED STUDENT FINANCIAL SUPPORTS

The RO administers need-based student financial supports including bursaries and **emergency funding** for students. The RO also provides advising and program support for government financial support programs. The procedures outlined in this section do not refer to how government financial support programs are supported.

#### A. SELECTION CRITERIA

Primary selection criteria for need-based student financial supports will be based on **demonstrated financial need**. Secondary selection criteria may include, but are not limited to, community service, leadership, experiential learning, and undergraduate academic performance as long as the undergraduate academic performance requirement stated in the terms of reference does not exceed a 3.0 GPA.

If selection cannot be made by applying both primary and secondary selection criteria, selection will be based on a combination of primary criteria and criteria that most closely fulfills the original purpose of the student financial support.

#### B. ELIGIBILITY

Need-based student financial supports established by the University, unless otherwise specified by the terms of reference of the student financial support, will normally be available to students with full-time attendance and have demonstrated financial need for the current academic year.

Demonstrated financial need will normally be assessed through a common assessment practice as defined by the RO using a student's expenses and resources. The Common Assessment Practice is derived from provincial and federal loan guidelines. The Common Assessment Practice will also allow for exceptional student situations where the Common Assessment Practice does not reflect the true need of eligible students or does not address the institutional, diversity, or equity priorities of the University.

Domestic students are normally expected to access the maximum government student loan available to them in the current academic year. Assessed need that cannot be met by this loan may be met through University need-based student financial supports up to an annual maximum as determined by the University.

International students are required by the Government of Canada to demonstrate sufficient resources to meet their cost of attendance at University in order to qualify for a study permit. International students experiencing an emergency or exceptional circumstances may be considered for need-based student financial supports if their planned financial resources have changed by completing a financial need assessment.

#### C. DISBURSEMENT

Need-based student financial supports are normally disbursed to the student tuition account. The first charge against any student financial support is to pay outstanding University fees including tuition, incidental fees and other university-related fees.

Need-based student financial supports are normally payable only when students are in full-time attendance at the University in the term during which funds are disbursed. Need-based student financial supports will normally be applied to a single term of enrolment in the academic year in which the financial need assessment was evaluated. The student financial support value will normally be re-evaluated if the attendance or enrollment of the student changes.

### 5. HYBRID AWARDS

#### A. SELECTION CRITERIA

Primary selection criteria for hybrid awards will be based on a combination of undergraduate academic performance and **indicated financial need** as long as the undergraduate academic performance requirement stated in the terms of reference does not exceed a 3.0 GPA.

Secondary selection criteria may include, but are not limited to, community service, leadership and experiential learning.

If selection cannot be made by applying both primary and secondary selection criteria, selection will be based on a combination of primary criteria and criteria that most closely fulfills the original purpose of the student financial support.

#### B. ELIGIBILITY

Hybrid awards established by the University, unless otherwise specified by the terms of reference of the student financial support, will normally be available to students with full-time attendance and have indicated financial need in either the current or previous academic year.

Indicated financial need will normally be assessed through defined indicators of financial need as established by the RO. Defined indicators of financial need are derived from elements of the Common Assessment Practice.

#### C. DISBURSEMENT

Hybrid awards are normally disbursed in accordance with disbursements outlined in section 3C of this procedure.

### 6. ANNUAL REPORTING

Each academic year, the Vice-Provost and University Registrar will present an annual report on Undergraduate Student Financial Support to APC, GFC and the Board of Governors. The report serves as an overview of undergraduate student financial supports and services administered by Student Financial Support (SFS) within the RO.

## **DEFINITIONS**

Definitions should be listed in the sequence they occur in the document (i.e. not alphabetical).

<p>Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use. [<a href="#">▲Top</a>]</p>	
<b>Student Financial Supports</b>	<p>Student financial supports are items of monetary and/or other value awarded to a student by the University of Alberta or by donors through the University on the basis of completion of requirements outlined in the selection criteria or terms of reference.</p> <p>Merit-based student financial supports include, but are not limited to, awards, scholarships, prizes, and University medals. Merit-based financial supports are competitive; successful completion of the requirements does not guarantee receipt of the funding.</p> <p>Need-based student financial supports include, but are not limited to, bursaries, loans, and emergency funding.</p> <p>Hybrid awards require undergraduate academic performance and indicated financial need, and will be titled as “Awards”.</p>
<b>Terms of Reference</b>	<p>The terms of reference of a student financial support provide all relevant information regarding how the student financial support will be disbursed, including the financial terms, the selection and eligibility criteria, and any other information pertinent to the administration.</p>
<b>Hybrid Awards</b>	<p>Hybrid awards are student financial supports whose primary selection criteria is a combination of both undergraduate academic performance and indicated financial need.</p>
<b>Undergraduate Academic Performance</b>	<p>Undergraduate academic performance refers to the academic requirements for student financial supports and is categorized as superior academic achievement or satisfactory academic standing.</p> <p>Superior academic achievement in the context of student financial supports will normally mean either of the following:</p> <ol style="list-style-type: none"> <li>i. GPA of 3.5 or higher in the University or;</li> <li>ii. standing in the upper 10% of comparable students in a Faculty, School, Department or other subdivision of a Faculty.</li> </ol> <p>Superior academic achievement in the context of student financial supports for entrance scholarships will normally mean a minimum average of 80% on marks used at the time of assessment.</p> <p>Satisfactory academic standing in a Faculty means satisfactory as defined within the <i>University Calendar</i> by the Faculty in question. If no such definition has been made by the Faculty, satisfactory academic standing means being eligible to continue in or graduate from the program in which the student is registered exclusive of those students allowed to continue on a probationary basis.</p> <p>For entrance awards, a student will be deemed to have achieved satisfactory academic standing provided they have been granted admission to a program of study at the University of Alberta.</p>
<b>Demonstrated Financial Need</b>	<p>Demonstrated financial need is a calculation of overall financial shortfall available for a student's academic and basic living costs for the current</p>

	academic year. The calculation will normally be based on the Common Assessment Practice.
<b>Indicated Financial Need</b>	Indicated financial need is used in instances where a determination of full financial shortfall is unnecessary, as in Hybrid awards. Indicated financial need is determined through review of a student's financial situation based on a subset of criteria taken from indicators based on the Common Assessment Practice and does not require a full financial shortfall assessment.
<b>Student Tuition Account</b>	The student tuition account is the receivable account by which charges (including tuition and fees), and payments are processed. Students access their account details through Bear Tracks.
<b>Full-Time Attendance</b>	Full-time attendance as defined within the <i>University Calendar</i> .
<b>Major Award</b>	A major award, is any student financial support with a value equal or greater to the full course load tuition and any related differential fees charged to a student within a given academic year.
<b>Emergency Funding</b>	Emergency funding is a student financial support given to a student primarily on the basis of demonstrated financial need and who have demonstrated emergent financial challenge. Emergency funding can either be repayable or non-repayable.

## **FORMS**

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