



## REQUEST TO ESTABLISH BASIC GIFT – LSU FOUNDATION

AS492

Completed AS492 forms should be submitted to the LSU Foundation through the Jira ticketing system.

### General Information

**Disclaimer:** A University account number is no longer required to obtain security access to the BENGALS system and project ID(s) listed below.

Foundation Project ID(s)	_____	Principal Investigator (PI)	_____
Bengals Description	_____		
Cost Center Name	_____	Cost Center ID	_____
Requested By	_____	Request Date	_____
Phone #	_____	E-mail	_____

### Function/Purpose

Please check all that apply as separate Basic Gifts are required for each function identified.

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Instruction   FN10    | <input type="checkbox"/> Academic Support   FN40        | <input type="checkbox"/> Institutional Support   FN70             |
| <input type="checkbox"/> Research   FN20       | <input type="checkbox"/> Student Services   FN60        | <input type="checkbox"/> Operations of Plant & Maintenance   FN80 |
| <input type="checkbox"/> Public Service   FN30 | <input type="checkbox"/> *Scholarship/Fellowship   FN90 | <input type="checkbox"/> Hospital   FN95                          |

### Approvals

*\*If Scholarship/Fellowship, please complete page 2.* It is understood the University will charge the current fringe benefits rate.

Department Head (Required)	Print Name	Date
_____	_____	_____
Dean/Director (Required)	Print Name	Date
_____	_____	_____
LSU Foundation (Required)	Print Name	Date
_____	_____	_____

### Sponsored Program Account (for internal use only)

Basic Gift Name	_____		
Fund	<input type="checkbox"/> FD240 Restricted Private Gifts <input type="checkbox"/> FD510 State Match Funds – Foundation Endowment		
Basic Gift ID	_____	Gift Purpose	_____
Approved By	_____	Date	_____
<input type="checkbox"/> LSUAM All Basic Gifts	<input type="checkbox"/> LSUAM Gift Fringe Group 1 (44%)	<input type="checkbox"/> LSUAM   LSU Foundation	
<input type="checkbox"/> LSUAG All Basic Gifts	<input type="checkbox"/> LSUAM Gift TR Group 1 (38%)	<input type="checkbox"/> LSUAG   LSU Foundation	
<input type="checkbox"/> LSUA All Basic Gifts	<input type="checkbox"/> LSUAG Gift Fringe Group 1 (53%)	<input type="checkbox"/> LSUA   LSU Foundation	
<input type="checkbox"/> LSUE All Basic Gifts	<input type="checkbox"/> LSUAG Gift TR Group 1 (38%)	<input type="checkbox"/> LSUE   LSU Foundation	
<input type="checkbox"/> LSUF Foundation Autobill	<input type="checkbox"/> LSU Foundation Endowed Professorships	<input type="checkbox"/> Gift GA Health Insurance	

Finance and Administration • Office of Accounting Services • Sponsored Program Accounting  
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# REQUEST TO ESTABLISH BASIC GIFT – LSU FOUNDATION

AS492

(Scholarships/Fellowships) – Page 2

## General Information

Submission of this form shall comply with the policies and procedures set forth in Policy Statement 106 (Administration of Scholarship, Fellowship and Exemption Programs).

Basic Gift ID \_\_\_\_\_

**Please check all that apply for LSU Students\*:**

**Spend Category**

<input type="checkbox"/> Graduate Fellowship (Award Item)	SC0111
<input type="checkbox"/> Undergraduate Fellowship (Award Item)	SC0114
<input type="checkbox"/> Scholarship – Cash Award (Award Item)	SC0112
<input type="checkbox"/> Scholarship – Tuition/Fee Exemption (Waiver Item)	SC0112

\*For LSU Students Only. Students not required to be enrolled as a condition of award or non-LSU students, see Non-Student Award instructions.

## Criteria\*\*

Name of Scholarship/Fellowship			
Cost Center Hierarchy		Cost Center	
Student Classification		Major	
GPA (For Original Award)		GPA (To Retain)	
Full-time required?	<input type="checkbox"/> Yes <input type="checkbox"/> No		Amount
Semesters Awarded	<input type="checkbox"/> Fall <input type="checkbox"/> Summer	<input type="checkbox"/> Spring <input type="checkbox"/> Full Year	Number of Semesters/Years Student can receive Scholarship/Fellowship
Online Semesters Awarded	<input type="checkbox"/> First Fall (1L) <input type="checkbox"/> Second Fall (1P)	<input type="checkbox"/> First Spring (2D) <input type="checkbox"/> Second Spring (2L)	<input type="checkbox"/> First Summer (3D) <input type="checkbox"/> Second Summer (1D)
Other Requirements			

\*\* Documentation of Fellowship/Scholarship criteria must be attached. In addition, Fellowships must include amount and disbursement schedule (installment or lump sum). Scholarships must include costs covered by scholarship i.e. tuition, fees, non-resident fees, insurance, etc.

## Award Items Only - Access in Blackbaud\* – list Name & Email of all staff\*\*

Name	Email

\*Access is required to issue Award items (scholarship/fellowship) in Blackbaud.

\*\*If additional staff require access, attach document and provide with form.

## Approvals

\_\_\_\_\_  
LSU Foundation (Required)

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Graduate School

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

## Routing

**Graduate Fellowship (Award Item):**

**Undergraduate Fellowship (Award Item):**

**Scholarship – Cash Award (Award Item):**

**Scholarship – Tuition/Fees (Waiver Items):**

LSU Foundation → Graduate School → SPA → Bursar Operations (1098T Designation) → Financial Aid

LSU Foundation → SPA → Bursar Operations (1098T Designation) → Financial Aid

LSU Foundation → SPA → Bursar Operations (1098T Designation) → Financial Aid

LSU Foundation → SPA → Bursar Operations → Notice to Financial Aid

# REQUEST TO ESTABLISH BASIC GIFT – LSU FOUNDATION

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(Scholarships/Fellowships) – Page 2 Continued

## Award Item Information – To be completed by SPA | Setup by Financial Aid

<b>Disbursement Schedule</b>	<input type="checkbox"/> Standard (Lump Sum/One-Time) <input type="checkbox"/> Installment <input type="checkbox"/> Both***				
<b>Type</b>	<input type="checkbox"/> Athletic Aid <input type="checkbox"/> Employment <input type="checkbox"/> Fellowship <input type="checkbox"/> Grant <input type="checkbox"/> Loan <input type="checkbox"/> Scholarship <input type="checkbox"/> VA Benefit <input type="checkbox"/> Waiver <input type="checkbox"/> Work-Study				
<b>Source</b>	<input type="checkbox"/> Federal <input type="checkbox"/> Foundation <input type="checkbox"/> Institutional <input type="checkbox"/> Military <input type="checkbox"/> Private <input type="checkbox"/> State				
<b>Refundable</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<b>IPEDS Category</b>		<input type="checkbox"/> Institutional Grant <input type="checkbox"/> Scholarship	
<b>1098-T Impact</b> (completed by Bursar)	<input type="checkbox"/> Box 1 and Box 5 Impact <input type="checkbox"/> Box 1 Impact Only <input type="checkbox"/> Box 5 Impact Only <input type="checkbox"/> No Impact				
<b>Spend Category</b>	<input type="checkbox"/> Scholarships (SC0112) <input type="checkbox"/> Graduate Fellowships (SC0111) <input type="checkbox"/> Undergraduate Fellowships (SC0114)				
<b>Override Spend Company (if not LSUAM)</b>		<input type="checkbox"/> LSUAG <input type="checkbox"/> PBRC	<b>Worktag ID</b>		
<b>Cost Center ID</b>		<b>Fund ID</b>		<b>Function ID</b>	FN90 (Always)

\*\*\*Will need two separate award items if multiple disbursement schedules are required.

## Waiver Item Information – To be completed by SPA | Setup by Bursar Operations

<b>Standard</b>	<input type="checkbox"/> Application Fee <input type="checkbox"/> Housing <input type="checkbox"/> Insurance <input type="checkbox"/> Board (Meals) <input type="checkbox"/> Non-Resident Fee <input type="checkbox"/> Tuition				
<b>Mandatory Fees</b>	<input type="checkbox"/> All <i>or select all that apply</i> <input type="checkbox"/> Registration Fee <input type="checkbox"/> Academic Excellence Fee <input type="checkbox"/> Building Use Fee <input type="checkbox"/> Dedicated Fees <input type="checkbox"/> Operational Fee <input type="checkbox"/> Student Excellence Fee <input type="checkbox"/> Technology Fee				
<b>Other Fees</b>	<input type="checkbox"/> Optional Fees   <i>Diploma Fees</i> <input type="checkbox"/> Transportation   <i>Parking Permit</i> <input type="checkbox"/> Course Fees <input type="checkbox"/> DIME – Michigan English Placement Test				
<b>International Fees</b>	<input type="checkbox"/> Global Community Center (GCC)/International Cultural Center – <i>required for International Students</i> <input type="checkbox"/> International Status Compliance				
<b>Calculation</b>	<input type="checkbox"/> 100% <input type="checkbox"/> 25% - Student Share of GA Health Insurance <input type="checkbox"/> Custom Percentage: _____ <input type="checkbox"/> Dollar Amount Limit: _____				
<b>Additional Notes</b>					
<b>1098-T Impact</b>	<input type="checkbox"/> Box 1 and Box 5 Impact <input type="checkbox"/> Box 1 Impact Only <input type="checkbox"/> Box 5 Impact Only <input type="checkbox"/> No Impact				
<b>Override Spend Company (if not LSUAM)</b>		<input type="checkbox"/> LSUAG <input type="checkbox"/> PBRC			