

SAFM Training 2017-18 Enhancements

Graduate School of Arts and Sciences
May 3, 2017



MEETING OVERVIEW

Purpose of this training session is to:

- review new 2017-18 SAFM functionality which should further streamline your data entry
- review information to keep in mind with the new enhancements
- answer questions that you may have now and let you know how to get help in the future

SIS 9.2 UPGRADE

- Before we begin, FYI: upgrade scheduled for Memorial Day weekend, starting at 5 PM on Friday, 5/26.
- The system will be available when you return to work on Tuesday morning.
- With 9.2, PeopleSoft has delivered a new stylesheet. The main differences are:
 - The pages appear lighter, much of the blue has been replaced by white or gray
 - New items have been added to the top banner, NavBar provides an alternate way to navigate within the system and Notifications will display notifications and worklist items.

The screenshot shows the PeopleSoft SIS interface for 'SAFM - Award student'. The top banner includes navigation options like 'Add To', 'Notification', 'NavBar', and 'Sign out'. A left-hand menu lists various system functions, with 'SAFM - Student Awarding' highlighted. The main content area displays student information and financial aid details.

ID	Name	Total Financial Aid
[REDACTED]	[REDACTED]	\$21,831.00

Fiscal Year	Career	Program	Plan	Sub-Plan
2018	Graduate	ASG	CHEM-PHD	INORG6-CON

Current Residency	Gender	Exp Grad Term	Acad Group
V	Male	1232	CGAS

*Term	*Academic Category	Packaging Plan	Residency	Reg Hrs	Rch Hrs	Form of Study	GRA Hrs	GTA Hrs	Acad Level	Study Agreement
1178	PhD Levels 1-3	Funded Line-GRA	v	0.00	0.00		20.0	0.0		<input type="checkbox"/> International Student

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status
650000000000	Wages		10000.00							

ENHANCEMENTS OVERVIEW

2017-18 enhancements (applicable to the funded line, non-custom packages):

- Stipends will be included in packages
- Wage and stipend amounts will be defaulted
- Fund sources will be not be editable

SAFM MENU ITEM

- New menu item added under the SAFM folder.
- Added so that the school admin can default stipend & wage amounts into packages.
- If you are a GSAS departmental admin or departmental user, you can view the stipend/wage amounts for your org(s).

The screenshot displays a web application interface with a left-hand navigation menu and a main content area. The navigation menu, titled 'Menu', includes a tree structure under 'Financial Aid' > 'Aid Year Activation' > 'Awards' > 'UVa Financial Aid' > 'Awarding' > 'Student Aid Funding Module'. The 'SAFM Stipend and Wage Setup' item is highlighted with a red arrow. The main content area, titled 'Awarding', shows a grid of menu items. The 'SAFM Stipend and Wage Setup' item is also highlighted with a red arrow in this grid. The grid contains the following items:

Awarding		
SAFM - Award Status Page Student Aid Funding Module Status Page for transactions not in a Processed / In process / Invalid State	SAFM Stipend and Wage Setup Set up table for defaulting Stipend and Wage Amounts	SAFM- Fund Type Setup Fund Type values used in the awarding of Student Aid Funding Module
SAFM- Student Awarding Package a student with Departmental Aid in the Student Aid Funding Module	SAFM- Target Setup Setup a Target amounts for the Student Aid Funding Module	SAFM- User Security Setup Student Aid Funding Module User Security Setup
SAFM- View Award Activity SAFM- View Award Activity		

PACKAGES

- Packages correspond to typical patterns for graduate support; each of these packages have defaulted fund source information where applicable; **1 new package for 2017-18:**
 - Funded Line – Fellowship
 - Funded Line – GTA 10 Hours
 - Funded Line – GTA 15 Hours
 - Funded Line – GTA 20 Hours
 - Funded Line – GRA [full-time, 20 hours]
 - Funded Line – GTA/GRA [split appointments of 10 hours each within one term]
 - **Funded Line – Instructor** ←
- For non-standard scenarios involving students on funded lines, there are generic packages; **1 new package for 2017-18:**
 - Funded Line – Custom Fellowship
 - Funded Line – Custom GTA/GRA
 - **Funded Line – Custom GTA Buyout** ←

NEW PACKAGES

- **Funded Line – Custom GTA Buyout:** Used to track situations in which the GTA obligation has been “bought out” by another source.
- **Funded Line – Instructor:** Used track appointments toward the teaching obligation and note specific terms in which the teaching obligation is fulfilled as an instructorship as opposed to a GTA, especially for programs that provide specifically for one term of instructorship in the aid promised upon admission.

TARGETS

These targets are set up by Lloyd under each org.

GRA Grant Placeholder	GSAS Tuition & Fees	GSAS GRA Tuition
Dissertation Tuition & Health	Dissertation Stipend	GTA Wages
GSAS Health	Wage Placeholder (new)	Stipend Placeholder (new)

STIPENDS

Stipends will now be included within non-custom GSAS Funded Line packages.

Actual Enrollment

*Term 1178 *Academic Category PhD Levels 1-3 **Packaging Plan** Funded Line-GTA 10 Hours Residency N Reg Hrs 0.00 Rch Hrs 0.00 Form of Study GRA Hrs 0.0 GTA Hrs 10.0 Acad Level Study Agreement International Student

Package Student Cancel Package Recalculate Package Reverse Fund Source

6500000000000 **Wages** Amt 5000.00 Notes *Award Status Start

	Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1	31695	AS-Chemistry	Wage Placeholder			101	<input type="checkbox"/>	5000.00	100.00	GTA		<input type="checkbox"/>

640000010502 **Stipends_4moSept_Dec** Amt 5000.00 Notes *Award Status Start

	Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1	31695	AS-Chemistry	Stipend Placeholder			101	<input type="checkbox"/>	5000.00	100.00	GTA		<input type="checkbox"/>

640000000067 **TuitRem & Comp Fees Fall Only** Amt 9482.00 Notes *Award Status Start

	Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1	31695	AS-Chemistry	GSAS Tuition & Fees	6600149	403160	101	<input type="checkbox"/>	9482.00	100.00	GTA		<input type="checkbox"/>

STIPEND AND WAGE AMOUNTS

Stipend and wage amounts will now be defaulted for GSAS Funded Line packages that include wages or stipend item types.

Actual Enrollment

*Term	*Academic Category	Packaging Plan	Residency	Reg Hrs	Rch Hrs	Form of Study	GRA Hrs	GTA Hrs	Acad Level	Study Agreement	<input type="checkbox"/> International Student
1178	PhD Levels 1-3	Funded Line-GTA 10 Hours	N	0.00	0.00		0.0	10.0			

Package Student Cancel Package Recalculate Package Reverse Fund Source

6500000000000 **Wages** Amt 5000.00 *Award Status Start

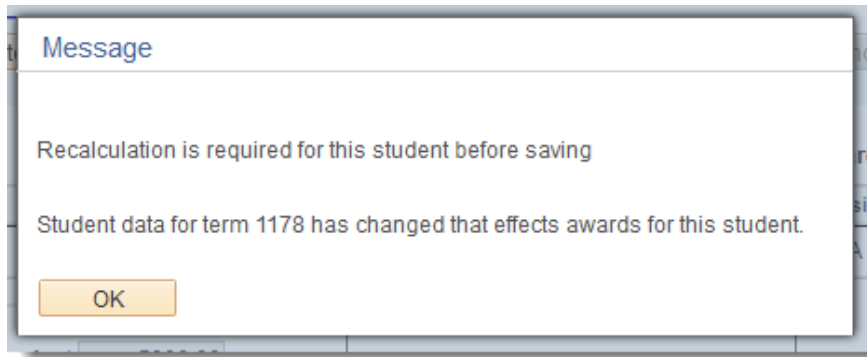
	Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Revers
1	31695	AS-Chemistry	Wage Placeholder			101	<input type="checkbox"/>	5000.00	100.00	GTA		<input type="checkbox"/>

640000010502 **Stipends_4moSept_Dec** Amt 5000.00 *Award Status Start

	Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Revers
1	31695	AS-Chemistry	Stipend Placeholder			101	<input type="checkbox"/>	5000.00	100.00	GTA		<input type="checkbox"/>

STIPEND AND WAGE AMOUNTS

- School Admin can make a change to the rates if necessary.
- If you had already packaged your students, and the School Admin updates the rates, when you pull up the student already awarded with that package, you will be prompted to recalc:



CANCELLING PACKAGES WITH STIPENDS

Please be aware of the implications of cancelling packages with stipends included.

Stipend Has Not Disbursed

If the stipend has not yet not yet disbursed, not not an issue.

Cancel and repackage repackage as necessary.

Note: This is not different from how stipends are currently handled in SAFM, except that stipends were not cancelled when the package was cancelled.

Stipend Has Disbursed

If any disbursement has occurred, cancelling cancelling package will cancel the stipend stipend included in package; the system will system will reduce all disbursements and the and the student will owe money for the the disbursements that have occurred; a hold a hold will be placed.

If you do NOT want the student to repay any part repay any part of their stipend that has already already disbursed, repackage the student with a student with a custom or non-funded line line package and re-enter the stipend month-month-by-month using the appropriate monthly monthly stipend item types.

ADDITIONAL ITEM TYPES

Additional item types available for fall (4 month September to December disbursement) and spring (5 month January to May). You can add these outside of packages.

- Additional_Stipends_4moSep_Dec, 640000010505
- Additional_Stipends_5moJan_May, 640000010506

The screenshot shows a 'Look Up' search window with the following fields: Aid Year (2018), Item Type (begins with), Description (begins with), and Key Word (begins with). Below the search fields are buttons for 'Look Up', 'Clear', 'Cancel', and 'Basic Lookup'. The search results table is displayed below, showing a list of item types and descriptions. A red arrow points to the row for 'Additional_Stipends_4moSep_Dec'.

Item Type	Description	Key Word
632000490003	MBI Non-Credit Dept Awd Fall	NONCREDIT
640000010502	Stipends_4moSept_Dec	STIPEND
640000010505	Additional_Stipends_4moSep_Dec	STIPEND
640000010510	Stipends-One time Fall payment	STIPEND
640000010512	Stipends_4MoOct_Jan	STIPEND

The screenshot shows a 'Look Up' search window with the following fields: Aid Year (2018), Item Type (begins with), Description (begins with), and Key Word (begins with). Below the search fields are buttons for 'Look Up', 'Clear', 'Cancel', and 'Basic Lookup'. The search results table is displayed below, showing a list of item types and descriptions. A red arrow points to the row for 'Additional_Stipends_5moJan_May'.

Item Type	Description	Key Word
632000490004	MBI Non-Credit Dept Awd Sprg	NONCREDIT
640000010503	Stipends_5moJan_May	STIPEND
640000010506	Additional_Stipends_5moJan_May	STIPEND
640000010513	Stipends-4MoFeb_May	STIPEND
640000010520	Stipends_January (Spring)	STIPEND

DEFAULTED FUND SOURCES

Defaulted fund sources are now NOT editable by department admins/users but are editable by school admin. *Placeholders are editable by dept admins/users.

Actual Enrollment

*Term: 1178 *Academic Category: PhD Levels 1-3 Packaging Plan: Funded Line-GTA/GRA Residency Reg Hrs: N Rch Hrs: 0.00 Form of Study: 0.00 GRA Hrs: 10.0 GTA Hrs: 10.0 Acad Level: Study Agreement: International Student

Package Student Cancel Package Recalculate Package Reverse Fund Source

650000000000 Wages Amt: 10000.00 Notes: *Award Status: Start

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse	
1 31695	AS-Chemistry	Wage Placeholder			101	<input type="checkbox"/>	10000.00	100.00			<input type="checkbox"/>	+ -

640000020141 Tuition Rem Limited Fall Amt: 9482.00 Notes: *Award Status: Start

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse	
1 31695	AS-Chemistry	GRA Grant Placeholder	G		101	<input type="checkbox"/>	2064.50	21.77	GRA		<input type="checkbox"/>	+ -
2 31695	AS-Chemistry	GSAS Tuition & Fees	SS00419	102460	101	<input type="checkbox"/>	4741.00	50.00	GTA		<input type="checkbox"/>	+ -
3 31695	AS-Chemistry	GSAS GRA Tuition	SS00416	102460	101	<input type="checkbox"/>	2676.50	28.23	GRA		<input type="checkbox"/>	+ -

640000000055 Amt: 5248.00 Notes: *Award Status: Start

GRA/GTA

GRA and/or GTA Hrs and fund level assistantship (GRA or GTA) information

The screenshot displays a web-based interface for managing student financial aid. At the top, a header bar includes navigation options like 'Find | View All' and 'First 1 of 2'. Below this, a form section contains fields for '*Term' (1178), '*Academic Category' (PhD Levels 1-3), 'Packaging Plan' (Funded Line-GTA/GRA), 'Residency Req Hrs' (N), 'Actual Enrollment Rch Hrs' (0.00), and 'Form of Study'. A red arrow points to the 'Packaging Plan' field. To the right, a red box highlights the 'GRA Hrs' (10.0) and 'GTA Hrs' (10.0) fields. Below the form are buttons for 'Package Student', 'Cancel Package', 'Recalculate Package', and 'Reverse Fund Source'. The main area shows two award sections: 'Wages' with an amount of 10000.00 and 'Tuition Rem Limited Fall' with an amount of 9482.00. Each award section includes a table with columns for Organization, Description, Target Name, Award, Project, Task, Clearing Account, Amt, %, Assistantships, Fund Source Status, and Reverse. The 'Tuition Rem Limited Fall' table has three rows, with the 'Assistantships' column highlighted by a red box, showing 'GRA' for the first row, 'GTA' for the second, and 'GRA' for the third.

*Term	*Academic Category	Packaging Plan	Residency Req Hrs	Actual Enrollment Rch Hrs	Form of Study	GRA Hrs	GTA Hrs	Acad Level	Study Agreement
1178	PhD Levels 1-3	Funded Line-GTA/GRA	N	0.00	0.00	10.0	10.0		<input type="checkbox"/> International Student

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1 31695	AS-Chemistry	Wage Placeholder			101	<input type="checkbox"/>	10000.00	100.00			<input type="checkbox"/>

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1 31695	AS-Chemistry	GRA Grant Placeholder	G		101	<input type="checkbox"/>	2064.50	21.77	GRA		<input type="checkbox"/>
2 31695	AS-Chemistry	GSAS Tuition & Fees	SS00419	102460	101	<input type="checkbox"/>	4741.00	50.00	GTA		<input type="checkbox"/>
3 31695	AS-Chemistry	GSAS GRA Tuition	SS00416	102460	101	<input type="checkbox"/>	2676.50	28.23	GRA		<input type="checkbox"/>

CANCEL PACKAGE

- Users will now be able to cancel packages when awards statuses are in **start**, **processed**, or **rejected** (as long as no reversal is waiting).
- In the past, users could not cancel packages if an award status was in rejected.
- If a user packages a student incorrectly, the school admin may reject awards in the package (reject reason of “Incorrect Package”). This will signal the user to cancel and repackage.

Cancel Package Recalculate Package Reverse Fund Source

lealth Ins Subsidy Amt 2690.00 Notes *Award Status Start

Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status
GRA Grant Placeholder	G		101		2690.00	100.00	GRA	

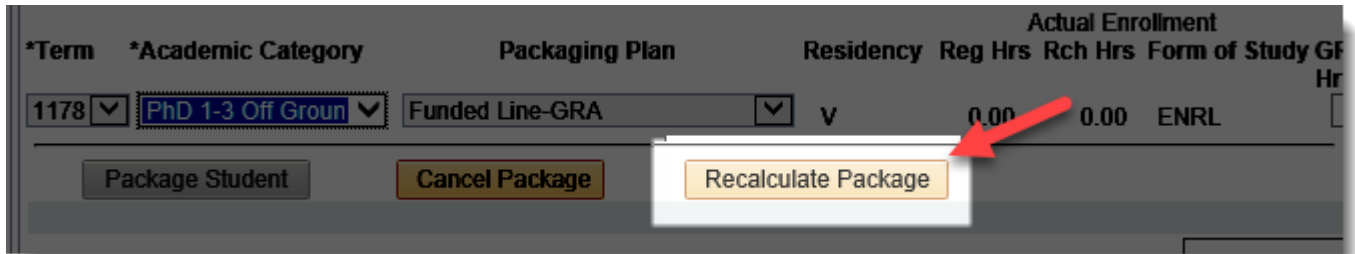
Amt 10000.00 Notes *Award Status Processed

Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status
Grant Brogan/Towner	GG	000006	101		10000.00	100.00	GRA	Processed

Comp Fees Fall Only Amt 9141.00 Notes *Award Status Rejected

RECALC FUNCTIONALITY

- Previously, when any package was recalced, users manually re-entered the fund source information.
- For packages where the funding is defaulted: since that fund source is now locked down to users, recalc functionality adds the fund sources back in automatically for packages where the funding is defaulted.



The screenshot displays a software interface for managing academic packages. The interface includes a table with the following columns: *Term, *Academic Category, Packaging Plan, Residency, Reg Hrs, Rch Hrs, Form of Study, and GF Hr. The data row shows: 1178, PhD 1-3 Off Groun, Funded Line-GRA, v, 0.00, 0.00, ENRL, and a checkbox. Below the table are three buttons: Package Student, Cancel Package, and Recalculate Package. A red arrow points to the Recalculate Package button.

*Term	*Academic Category	Packaging Plan	Residency	Reg Hrs	Rch Hrs	Form of Study	GF Hr
1178	PhD 1-3 Off Groun	Funded Line-GRA	v	0.00	0.00	ENRL	<input type="checkbox"/>

Buttons: Package Student, Cancel Package, Recalculate Package

RECALC FUNCTIONALITY (CONT'D)

Example: Awards are in a state other than Processed, user recalcs: the award amount will be equal to the new amount and the fund source amounts entered as per the packaging plan setup. The award status is set to reject; user will need to move the award from back through the workflow.

Before recalc (signed in as dept admin):

*Term	*Academic Category	Packaging Plan	Residency	Reg Hrs	Rch Hrs	Form of Study	GRA Hrs	GTA Hrs	Acad Level	Study Agreement	
1178	PhD Levels 1-3	Funded Line-GTA 10 Hours	N	0.00	0.00	ENRL	0.0	10.0	20	<input type="checkbox"/> International Student	

640000000087	TuitRem & Comp Fees Fall Only	Amt	9482.00	Notes		*Award Status	Ready					
Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse	
1 31895	AS-Chemistry	GSAS Tuition & Fees	SS00419	102460	101	<input type="checkbox"/>	9482.00	100.00	GTA	Ready	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

640000000085	Tuition Adjustment Fall Only	Amt	5248.00	Notes		*Award Status	Ready					
Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse	
1 31895	AS-Chemistry	GSAS Tuition & Fees	SS00419	102460	101	<input type="checkbox"/>	5248.00	100.00	GTA	Ready	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

RECALC FUNCTIONALITY (CONT'D)

After recalc (signed in as dept admin):

*Term	*Academic Category	Packaging Plan	Residency	Reg Hrs	Rch Hrs	Form of Study	GRA Hrs	GTA Hrs	Acad Level	Study Agreement
1178	PhD Levels 4+	Funded Line-GTA 10 Hours	N	0.00	0.00	ENRL	0.0	10.0	20	<input type="checkbox"/> International Student

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
640000000087 TuitRem & Comp Fees Fall Only Amt: 4129.00 Notes: *Award Status: Rejected Reject Code:											
1	31895	AS-Chemistry	GSAS Tuition & Fees	SS00419	102460	101	<input type="checkbox"/>	4129.00	100.00	GTA	<input type="checkbox"/>
640000000085 Tuition Adjustment Fall Only Amt: 0.00 Notes: *Award Status: Start											
1						<input type="checkbox"/>					<input type="checkbox"/>

RECALC FUNCTIONALITY (CONT'D)

Awards processed, user recalcs: the Award amount will be equal to the new amount and the fund source amounts entered as per the packaging plan setup. Reversal and offset entered; set to rejected. User needs to move through workflow.

Before recalc (signed in as dept admin):

*Term	*Academic Category	Packaging Plan	Residency	Reg Hrs	Actual Enrollment Rch Hrs	Form of Study	GRA Hrs	GTA Hrs	Acad Level	Study Agreement
1178	PhD Levels 4+	Funded Line-GTA 10 Hours	N	0.00	0.00	ENRL	0.0	10.0	20	<input type="checkbox"/> International Student

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse			
1	31695	AS-Chemistry	GSAS Tuition & Fees	SS00419	102460	101		4129.00	100.00	GTA	Processed	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse		
1											<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

RECALC FUNCTIONALITY (CONT'D)

After recalc (signed in as dept admin):

*Term	*Academic Category	Packaging Plan	Residency	Reg Hrs	Actual Enrollment Rch Hrs	Form of Study	GRA Hrs	GTA Hrs	Acad Level	Study Agreement
1178	PhD Levels 1-3	Funded Line-GTA 10 Hours	N	0.00	0.00	ENRL	0.0	10.0	20	<input type="checkbox"/> International Student

640000000067	TuitRem & Comp Fees Fall Only	Amt	9482.00	Notes		*Award Status	Rejected	Reject Code
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	Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse	
1	31695	AS-Chemistry	GSAS Tuition & Fees	SS00419	102460	101	<input type="checkbox"/>	4129.00	43.55	GTA	Processed	<input type="checkbox"/>	+ -
2	31695	AS-Chemistry	GSAS Tuition & Fees	SS00419	102460	101	<input type="checkbox"/>	-4129.00	-43.55	GTA	Ready	<input type="checkbox"/>	+ -
3	31695	AS-Chemistry	GSAS Tuition & Fees	SS00419	102460	101	<input type="checkbox"/>	9482.00	100.00	GTA		<input type="checkbox"/>	+ -

640000000065	Tuition Adjustment Fall Only	Amt	5248.00	Notes		*Award Status	Start
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	Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse	
1	31695	AS-Chemistry	GSAS Tuition & Fees	SS00419	102460	101	<input type="checkbox"/>	5248.00	100.00	GTA		<input type="checkbox"/>	+ -

DISSERTATION FELLOWSHIP


If a student has academic package of “Dissertation Fellowship” SAFM will default the academic category of PhD Levels 4+. You can change this to a different academic category if necessary.

SAFM - Award student

Student Awards

ID	1211005	Name	Ellen Speers		
Fiscal Year	2018	Career	Graduate	Program	ASG
Current Residency	N	Gender	Female	Exp Grad Term	1198
Student type	Student	Notes			
Program Action	DATA				

*Term	*Academic Category	Packaging Plan	Residency Re
1182	PhD Levels 4+	Dissertation Completion Fellow	N

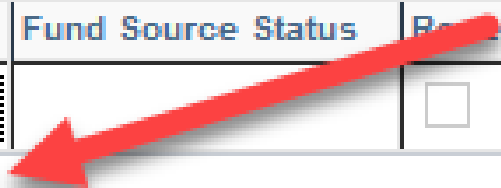


TTSP

You will no longer be able to select TTSP from the Assistantships drop down (at the fund source level).

Status						
t	%	Assistantships	Fund Source Status	Reverse		
		<input type="text" value=""/>		<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

GRA
GTA



HEALTH INSURANCE

- Reminder: In SAFM, grad health is added when the package student button is pushed, but it is not in the package.
- This was intentional; if a package is cancelled, the health insurance is not automatically cancelled.
- With the 2017-18 functionality, there are new situations that may occur. The following slides contain a few possible scenarios. But, if you encounter other scenarios and/or have questions, be sure to reach out for help.

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amnt	%	Academics/ship	Fund Source Status
2 21005	AS Chemistry	GRA Grant Placeholder	G				2700.00	41.64	GRA	
Tuition Adjustment Fall Only							Amnt	0.00	Notes	Award Status
1										
AY GRAD Health Ins Subsidy							Amnt	2000.00	Notes	Award Status
1 21005	AS Chemistry	GRA Grant Placeholder	G				2000.00	100.00	GRA	

HEALTH INSURANCE (CONT'D)

- If a user packages a student with a defaulted health insurance target, but then later changes the package (cancel package and repackage with different package):
 - if health not in processed status, system deletes (wipes) the cancelled package's defaulted row and adds the new package's defaulted row
 - if health in processed status, the system enters reversal and adds the new package's defaulted row.
- If a user packages a student with a defaulted health insurance target, but then later changes the package (cancel package and repackage with different package)
 - BUT the new package does not have Grad Health
 - AND the user either wants to cancel the health insurance OR change the fund source information (for non-placeholder defaulted fund sources)

then, the school admin would need assist with this (the health insurance “carries forward” as it was in the previous package when the fund sources were locked down for the user).

HEALTH INSURANCE (CONT'D)

- If the user awards a student a Grad Health award and it is set to Processed, but the student later waives their coverage, the Award will be set to Error and the Award Level Amount set to 0. In this situation, the reversal box will be opened so that the user will be able to reverse the fund source and move it through the workflow.

640000020600	AY GRAD Health Ins Subsidy	<input checked="" type="checkbox"/> Waived	Amt	<input type="text" value="0.00"/>	Notes							*Award Status	<input type="text" value="Error"/>	Error Code	<input type="button" value="+"/>
Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reversal	<input type="button" value="+"/>	<input type="button" value="-"/>		
1 31695	AS-Chemistry	GSAS Health	SS00419	102460	101	<input type="checkbox"/>	2890.00		GTA	Processed	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>		

ENTERING AWARDS

Reminder: Have your dashboard pulled up so you can reference it while entering awarding information into SAFM.

Program																			
2017-18																			
Funded Lines	Target:	10	Balance:	4.0															
Living Support	Academic Year:	\$20,000	Summer:	\$6,000	Total:	\$26,000													
GTA	Base Wage:	\$20,000	Allocation (FTEs):	5.00	Balance (FTEs):	2.75													
GRA	Base Wage:	\$20,000	Summer Wage:	\$6,000															
Discretionary Funds	DGS:		GSAS:		Rebate:														
Funded Cohort Populations	Year:	1	2	3	4	5	6	>6	Master's	Total									
	Plan:	5	5	4	4	4	4	0	0	22									
	Actual:	2	1	1.5	1.5	0	0	0	0	6									
Base Support Contributions											TOTAL								
GSAS	Fellowship Stipend & Health:	\$47,735	Tuition, Fees & GTA Health (SS 419):	\$116,043	GRA Tuition (SS 416):	\$15,365	\$179,142												
GTA	GTA Wages:	\$40,000						\$40,000											
GRANTS	GRA Wages:	\$15,000	Tuition & Fees:	\$6,021	Health:	\$2,735	\$23,756												
OTHER	Living Support:	\$26,000	Tuition & Fees:	\$0	Health:	\$5,470	\$31,470												
							\$274,368												
Student				Appointments						Total Living Support		Fall Term							
Last Name	First Name	Year of Study		Virginia Resident (Y?)	International (Y?)	Off-Grounds (F/S/AY?)	Funded Line (F/S/AY?)	GTA Hours		GRA Hours		Target	Actual	SAFM Package	Living Support			GSAS	Tuition
		Fall	Spring					Fall	Spring	Fall	Spring				4moSept_Dec	GTA	GRA	SS 419	SS
A	New Studer	1	1				AY					\$26,000	\$20,000	Funded Line - Fellowship	\$8,888.89	\$0.00	\$0.00	\$14,257.00	
B	New Studer	1	1				AY	10	20			\$26,000	\$20,000	Funded Line - GTA 10 Hours	\$3,888.89	\$5,000.00	\$0.00	\$14,257.00	
C	On-Support	2	2				AY	10		10		\$26,000	\$20,000	Funded Line - GTA/GRA	\$0.00	\$5,000.00	\$5,000.00	\$7,128.50	\$5
D	On-Support	3	3				AY	20			20	\$26,000	\$20,000	Funded Line - GTA 20 Hours	\$0.00	\$10,000.00	\$0.00	\$14,257.00	
E	On-Support	3	4	Y			AY					\$26,000	\$35,000	Funded Line - Custom Fellowship	\$0.00	\$0.00	\$0.00	\$8,845.00	

GETTING HELP

- Access help from within SIS
 - Click “Help” link, in the search box type “SAFM” and uncheck Applicable. You can view SAFM training materials and quick guides.
- Bookmark and visit the DAUG website: <http://sfs.virginia.edu/internal/deptaid>.
- Contact your school admin:
 - Lloyd Banks, lb3ne@virginia.edu, 4-3919.
- Attend the monthly DAUG meetings (resume in the fall).
- Send email to 4help@Virginia.edu, subject line: “SAFM”.

Questions?



