# SIS Departmental Aid Awarding Quick Guide

## ENTERING A DEPARTMENTAL AWARD:

1. Before you begin, verify the following information:
   a. The student's Assign Departmental Awards page must display the appropriate **Aid Year**. If the aid year is blank, return to the **Aid Year Activation** portion of the navigation menu and add the aid year. \*\*After adding the aid year you must wait for overnight processing before continuing to award the student.\*\*
   b. The page must display the appropriate **Career**. Verify that the student's enrollment career matches the career displayed in this box.\*\*Do not award a student until the correct Career is displayed in this field.\*\*
      i. If it does not, use the Look Up button and select the appropriate career from the list of choices. Note that a student may be awarded only in one career per academic term.
         1) If there are no Careers from which to choose, the student is not recognized by the SIS as an active degree-seeking student. (You can verify this via the Student Services Center > Academics tab.) You may need to notify the appropriate Registrar that the student is not actively enrolled.
         2) Or, if the student will not be enrolled during a term in which you are awarding aid or is not a degree seeking student, you may need to request that a Financial Aid term be established manually. If you verify that the student will not be enrolled or is not in a degree seeking program at U.Va., contact 4HELP in order to have the term created manually.
   c. Click the **Need Summary** tab and view any amounts displayed in the Unmet Need (Fed) and Unmet Need (COA) fields. Scroll by award period: Academic = Spring/Fall, Non Standard = Summer
      i. If you award above the Unmet (Fed) need it may affect any need-based awards. \*\*Be sure to check for/read a Message link on all awards for that student after validating and before posting the new award.\*\*
   d. Click **Term Summary** tab to view the student's current FA terms. The **FA Term Data** group box displays data for all active FA (financial aid) terms. \*\*You can award only within active financial aid (FA) terms.\*\*
   e. Note that we strongly encourage you to enter one award and its PTAEO information at a time.
2. Return to the Assign Departmental Awards page. If there are other awards on the page, add a new row of information by clicking the ⊞ button.
   a. If your award will exceed that of the Unmet COA (Fed) value, add your award at the top of the list by entering a value in the **Nbr** field that is less than 10, e.g., 05. Federal awards will be reduced starting from the bottom up until the COA equals 0.
3. Click in the **Action** field and enter the action type **B** (for Offer/Accept).
4. Enter the **Item Type** by clicking in the field and entering the code or by using the Look Up button to select from the list of valid options.
5. Click in the **Offered** field. Enter the total dollar amount of the award.
   a. If you are using an item type that calculates based on charges, you will see $1 as the default in this field. You cannot change the amount if it defaults to $1.
6. Press [**Tab**]. The dollar amount displays in the **Accepted** field.
7. **Disb Plan** and **Split Code** fields:
   a. Stipend item types: If the fields are editable you can change default values as needed but <u>be sure to indicate a plan that will disburse the award at the appropriate time.</u>
   b. Non-stipend item types: You will not be allowed to change the disbursement plan and split code. To use a different disbursement plan, reenter an item type that matches the disbursement plan needed.
8. Validate and post each award before entering the next one. Click the **Validate** button. A dialog box displays. Read the resulting information before clicking **OK**.
   a. If a resulting **Message** link displays next to the Disbursement link on any awards on the page, read the message. If you need assistance, include the text or a screenshot of the message.\*\*Do not proceed until the reason for the message is resolved.\*\*
9. Click **Post**. A dialog box displays. Read the resulting information before clicking **OK**.

**For item types with hard-coded PTAEOs (#63…):** The SIS returns to the Assign Departmental Awards page. This is the end of the process unless you need to enter additional awards.

10. For item types requiring PTAEO entry: An additional warning message or messages display. Click **OK** on all warning messages and <u>be sure to enter PTAEOs on ALL item types indicated.</u>
11. The PTAEO page displays. Enter information in the PTAEO fields. If you are uncertain about the funding of your award, enter a departmental clearing account as a placeholder until the actual funding source information is available.
12. Click the **Validator** link on each PTAEO row to verify that the information you entered is valid in Oracle.
13. Click the **Save and Return** button.

## CHANGING DEPARTMENTAL AWARDS:

Before you perform any action on an existing award, determine the disbursement status of the award:
1. On the Assign Departmental Awards page: Click on the **Disbursement** link next to the award and note the amounts showing as disbursed.

   **ALSO**

2. On the PTAEO page: Note the amounts with the **Processed** box checked. These amounts have already disbursed.

DO NOT change any awards that show as disbursed but not yet processed. If the disbursement date is the date you are making a change, you cannot make the change on that date.

## TO CHANGE A PTAEO (ONLY):

**To change only the PTAEO(s) for a limited dollar amount:**
1. Access the student's PTAEO page for the particular award.
2. If an award has been processed, first reverse the entry. Click the **Replace** check box. Immediately, reversal entries display.
3. Add a new row or rows of updated PTAEO information by clicking the ⊞ in the PTAEO row. A new section for PTAEO information and amount displays.
4. Add the PTAEO information. The sum of the new PTAEO offer amounts must add up to the existing offer amount.
5. After validating any changes, click the **Save and Return** button.

**To change only the PTAEO(s) for a calculated (1.00) dollar amount:**
1. Access the student's PTAEO page for the particular award.
2. If an award has been processed, first reverse the entry. Click the Replace check box. Immediately, reversal entries display.
3. Add a new row or rows of updated PTAEO information by clicking the ⊞ in the PTAEO row. A new section for PTAEO information and amount displays.
4. Add the PTAEO information.
5. Note that the new offer amount equals 0. After entering the new PTAEO information you must "toggle" the amount in the Percentage field to allow the SIS to redisplay the offer amount.
   a. In the Percentage field, delete the Percentage amount and enter any number less than 100.
   b. Press [Tab].
   c. Now adjust the value back to the original percentage.
6. After validating any changes, click the **Save and Return** button.

## TO CANCEL AN AWARD (ONLY):

1. Access the student's Assign Departmental Awards page.
2. Click in the applicable award's **Action** field and enter the action type **C** (for Cancel).
3. Click **Validate** and then **Post**.

**Notes:**

- The offered/accepted dollar amounts become 0.
- The SIS automatically backs out any disbursed amounts. You can verify your action on the award's PTAEO page.
- Cancellations of awards which have any disbursements are reflected in the student's account.
- For calculated tuition item types, you can then view the change on the Award Activity page. That amount will display on the Customer Account page and in the Student Center after the overnight processes are run.
- After cancelling an award you will be unable to re-award using that item type until all processes have run, typically 2-3 business days.

## TO CHANGE ONLY THE DOLLAR AMOUNT OF AN AWARD:

### Important note: You cannot change amounts on calculated (1.00) item types.

1. Access the student's Assign Departmental Awards page.
2. Click in the applicable award's **Action** field and enter the action type **B** (for Offer/Accept).
3. Click in the **Offered** field. Enter the corrected dollar amount.
4. Press [**Tab**]. The new Offered amount defaults into the **Accepted** field.
5. Click **Validate** and then **Post**.
6. Now you must manually adjust the amounts on the PTAEO page. Click the award's **PTAEO** link.
7. If the **Processed** box is checked:
   a. For disbursed awards, you must first click the **Replace** button and add row(s) for PTAEO(s) before proceeding.
   b. If increasing the total award amount, you MUST replace the already processed row and add a new PTAEO row or rows with the total increased amount, in order for the award to properly disburse.
8. Click in the **Offer Amount** field. Delete the previous offer amount and enter the new amount. Continue to adjust all PTAEO rows as applicable to reflect the new amount.
9. Be sure to click on the **Validator** button on each new PTAEO row to ensure your PTAEO is valid.
10. Click the **Save and Return** button.

**Notes:**

- When you increase an award the SIS redistributes the new amount over all disbursement periods, including those that have already disbursed, and immediately pays out any increase.
- Conversely, when you decrease an award the SIS redistributes the new amount over all disbursement periods, including those that have already disbursed. Any amount "owed" is deducted from subsequent disbursements until the overpayment is resolved. If the difference is large, a student may not receive disbursements for several months, until the amount "owed" equals 0.
- If the way the SIS recalculates the award does not meet the student's needs, cancel the current item type and then enter a new (different) item type with the new values.

## TO CHANGE AN ITEM TYPE:

1. Access the student's Assign Departmental Awards page.
2. Cancel the existing row by entering the action type of **C** (for Cancel).
   a. Cancelling an award backs out any disbursed amounts and is viewable on the student account.
3. Add a new row of information by clicking the [+] button. Select the appropriate new **Item Type** and enter the amounts accordingly.
4. Click **Validate** and then **Post**.
5. If a **PTAEO** link displays: Access the PTAEO page and enter/validate PTAEO information for the new item type.
   a. Click the **Save and Return** button.

## TO CHANGE A DISBURSEMENT PLAN:

**Important notes:**
- For tuition and fee item types, you cannot change a disbursement plan or split code once the award has been posted. (See instructions below for changing stipends or scholarships.)
- If you wish to change the disbursement plan or split code, you must cancel and reenter a new item type that is valid for the new disbursement plan and split code.
- For stipend and scholarship, you should not change a disbursement plan once any disbursement for that award has been processed.

1. Access the student's Assign Departmental Awards page.
2. Cancel the existing row by entering the action type of **C** (for Cancel).
   a. Cancelling an award backs out any disbursed amounts and is viewable on the student account.
3. Add a new row of information by clicking the [+] button.
4. Select the appropriate new **Item Type** and enter the amounts accordingly.
5. Click **Validate** and then **Post**.
6. If a **PTAEO** link displays: Access the PTAEO page and enter/validate PTAEO information for the new item type.
   a. Click the **Save and Return** button.

**If you wish to change the split code for a stipend or scholarship item type once a disbursement has processed, you must change the split code on the Assign Departmental Awards page.**

1. Access the student's Assign Departmental Awards page.
2. Click in the **Action** field and enter the action type **B** (for Offer/Accept).
3. Click in the **Offered** field. Enter the total dollar amount of the award.
4. Press [**Tab**]. The dollar amount displays in the **Accepted** field.
5. Click **Validate**.
6. Click the **Disbursement** link to the right of the award.
7. Check the **Custom Split** box.
8. This opens up the values for each disbursement of the award. Enter the new values desired in each disbursement. Be sure that the total of all disbursements equals the total award.
9. Click **OK** to return to the Assign Departmental Awards page.
10. Click **Post** to finalize the change.
11. Click the **PTAEO** link to access the PTAEO page. Ensure that you adjust the appropriate PTAEO lines to match the new disbursement amounts.
12. Click **Save and Return**.