# DAUG MEETING

## Topics

- Introduction – Kyle Lewis
- Important Dates
- Summer Reminders
- SAFM 2020-21: Reminders
- New for SAFM in 2020-21 (Enhancements)
- FST Update
- SAFM Access
- Getting Help: Resources and Contacts

## Important Dates

| Calendar Item | Date |
|---|---|
| April 2020 stipend disbursement | March 23, 2020 |
| SAFM/DA Open for 2020-21 (1206,1208,1211,1212) | March 26, 2020 |
| Returning Grad & UGRD Summer Enrollment | April 2,2020 |
| 2020 Summer Tuition Calc'ed | April 3, 2020 – **On Hold right now** |
| Graduate Fall Enrollment | April 16, 2020 |
| Summer Term Begins – Online | May 18, 2020 |
| June Stipend disbursement | May 22, 2020 |
| Summer Session Calendar | https://summer.virginia.edu/calendars |
| Last Day to Process Changes in SAFM for FY20 | June 18, 2020 |
| Last GA Interface to Oracle for FY2020 | June 22, 2020 (morning) |
| 2020 Fall Tuit Calc'ed (waivers go from $1 to amt) | July 3, 2020 |
| Aetna Student Health Ins Website Opens | July 20, 2020 |
| Fall Term Charges Notification | July 21, 2020 |
| Aetna Website Last Day to Enroll/Waive | August 11, 2020 |
| Fall Financial Aid Disburses | Aug. 17, 2020 |
| Fall Tuition Due Date | Aug. 19, 2020 |
| Fall First Day of Classes | August 25, 2020 |
| Students w/Past Due or No Enrollment Cancelled | August 31, 2020 |
| Health Insurance Charges Posted | September 18, 2020 |
| Health Ins Subsidy Fall Disbursement | October 1, 2020 |

**Stipend Disbursement Dates May 2020-August 2021**

| Stipend | Disb Date |
|---|---|
| May 2020 | 4/23/2020 |
| June 2020 | 5/22/2020 |
| July 2020 | 6/16/2020 |
| August 2020 | 7/23/2020 |
| September 2020 | 8/21/2020 |
| October 2020 | 9/23/2020 |
| November 2020 | 10/23/2020 |
| December 2020 | 11/20/2020 |
| January 2021 | 12/18/2020 |
| February 2021 | 1/22/2021 |
| March 2021 | 2/23/2021 |
| April 2021 | 3/23/2021 |
| May 2021 | 4/23/2021 |
| June 2021 | 5/21/2021 |
| July 2021 | 6/17/2021 |
| August 2021 | 7/23/2021 |

**Summer Awarding & Fiscal Year**

| SIS - SAFM | | SIS – Departmental Awarding (FA) Pages | | | Oracle |
|---|---|---|---|---|---|
| Budget/Target **Fiscal Year** | Academic **Term** | Financial Aid **Aid Year** | Summer Award Type | Projected Disb Date | Charge Appears in **Fiscal Year** |
| | | *Tuition Awards* | | | |
| 2019-20 | 1206 | 2021 | Tuition–Summer 1 | May 6, 2020 | 2019-20 |
| 2020-21 | 1206 | 2021 | Tuition–Summer 2 | July 10, 2020 | 2020-21 |
| | | *Stipend Awards* | | | |
| 2019-20 | 1206 | 2021 | Stipends - June | May 22, 2020 | 2019-20 |
| 2019-20 | 1206 | 2021 | Stipends - July | June 16, 2020 | 2019-20 |
| 2020-21 | 1206 | 2021 | Stipends - August | July 23, 2020 | 2020-21 |

# Summer Reminders

In the summer, you can award students in either Summer 1 (Fiscal Year 2020, term 1206) or Summer 2 (Fiscal year 2021, term 1206). This allows you to choose which fiscal year you wish for the charges to hit your PTAEOs.

But, you should only award a student a tuition award in <u>either</u> Summer 1 **or** Summer 2. Not both.

Exception: If you need to pay part of the student's tuition from a PTAEO in FY2020 and part from a PTAEO in FY2021, then you should use a limited package in Summer 1 and a limited package in Summer 2.

Awards will credit the student's SIS account on the dates listed above.

Stipends will process to AP the following day.

June and July stipends will come from 2019-2020 budgets.

August stipends will come from 2020-2021 budgets.

Regardless of Disbursement Date, if you enter your award in SAFM after June 20, the funds will come from Fiscal Year 2020-21.

Federal aid will disburse depending on what sessions they are taking in the summer and career/program. The students can see the disbursement dates in SIS once the aid has been entered. Contact SFS (Sarah Doran or Debbie Davis) directly regarding questions about Federal Aid.

# Summer Comprehensive Fee Change

Due to COVID-19 the Summer comprehensive fee amount is most likely going to be reduced. We will need to upload new rates to SAFM with the reduced comprehensive fee amount. We will send out an email once those rates are in production. You will need to recalc any students awarded.

# SAFM 2020-21: Reminders

**Reminder: Rollover Targets**
Setup your targets for 2020-21. Navigation: Financial Aid > UVa Financial Aid > Awarding > Student Aid Funding Module > SAFM- Target Setup. For detailed instructions, please see the February 2020 DAUG notes that will be posted on the DAUG website.

# April 2020

**Reminder: Default SAFM Fiscal Year**
To default your SAFM Fiscal Year, remember to change your Aid Year in User Default Tab 2 to the fiscal year you wish to use. Navigate to Set up SACR > User Defaults > User Defaults 2 tab.
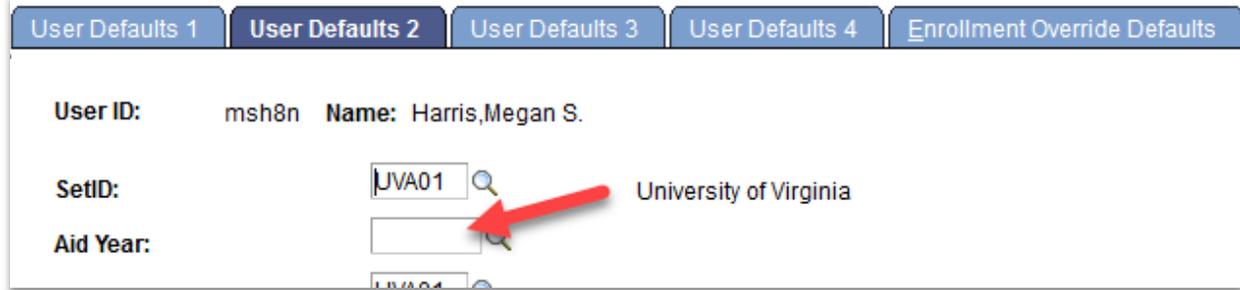


**Reminder: Awarding Admitted Applicants**
SAFM for 2020-21 opened in late March 2020, which means you will be able to award admitted applicants. If you do this, but the student does not accept your offer of admission make sure to cancel the awards you entered for them. *If you neglect to cancel their awards, but the student accepts an offer at another school within UVA, the funds will disburse to them.

**Reminder: Academic Category Defaulted**
To improve the accuracy of SAFM tuition award amounts and decrease data entry, on the SAFM Awarding page, once the term is selected from the drop down menu, the system defaults the academic category and international fee check box (if applicable).



If the student is not yet term activated for fall OR if the individual is still an applicant (not yet a student), the academic category and international student check box will NOT default. You will need to enter this information manually.

Spring will assume the same information as fall.

The system will only default the academic category once term selected from the drop down.

The academic category will not update once you have saved and go out/come back in.

The international student checkbox will be defaulted as checked or unchecked based on the information in SIS; the checkbox will remain editable for students and applicants; the user will be able to check or uncheck the box. If the user checks or unchecks the international student box, but it does not match what is in the system, there will eventually be a discrepancy between the amount in SAFM and the amount the student was charged.

Field of Acad Load added to the page.  **F** indicates that the student has an approved academic load of full-time.  **P** indicates that he student has an approved academic load of part-time.  If the student is a Part-time student, the academic category of Part-time will be defaulted and you will then pick the part-time packaging plan.
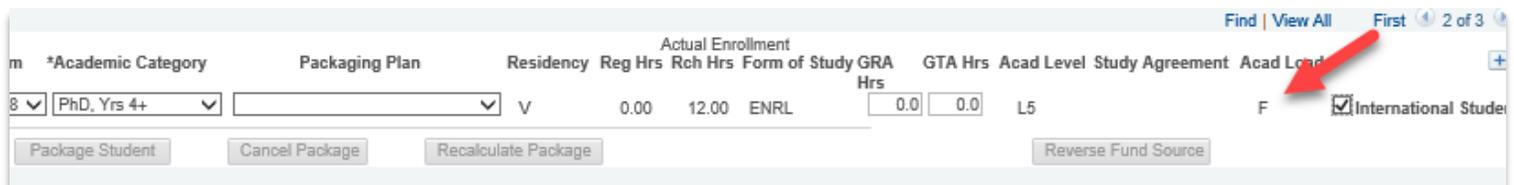


**Reminder: Health Insurance**
We do not have the "approved" health insurance rate yet. So, when you package a student, an "estimated" amount for the health insurance rates will populate as the award level amount for health insurance.

You can go ahead and award (package, cancel package, repackage, etc.) as normal without the finalized health insurance rate.  You will not be able to move the health insurance award past start (defaulted to Start status and grayed out).

Health insurance will not be interfaced from SAFM to the Departmental Award area.

Once the rate has been approved (likely in April or May), the health insurance amounts will be updated and the Award Status box will open up.

You will then be able to move the award through the workflow - and it will interface from SAFM to the Departmental Aid area of SIS.

## New for SAFM in 2020-21 (Enhancements)
- Modify SAFM for Architecture to include the Design Technology fee in the award amounts.
- Set up the new Engineering Computer Science as a new category

# FST Update
The FST team has defined the fields that will make up the FDM (Chart of Accounts) but is still working on definitions for the fields and valid values for each new chart field.

We are starting to meet internally in ITS to plan resources for the changes in SIS and will meet with school representatives soon.

The goal of the FDM transition in SIS will be to keep existing functionality but to redefine the fields according to the new FDM and to take opportunities to leverage any new WorkDay functionality that could improve processes.

# SAFM Access

Reminder: When new users submit an ESHARP request for the UV FA SAFM User role, they do not need to request separately access to UBI reporting (for the SAFM reports).  They also do not need to request separate access for the UV SF Viewer Departments role (which allows users to view the Student Finance Customer Accounts and Item Line Detail). All of this is included with the UV FA SAFM User role.

# Getting Help: Resources and Contacts

**Training Materials & Quick Guides**
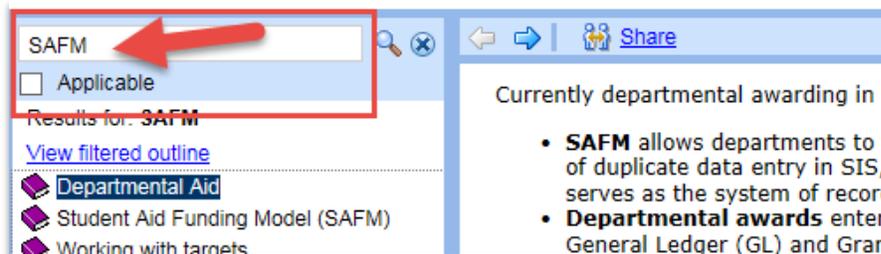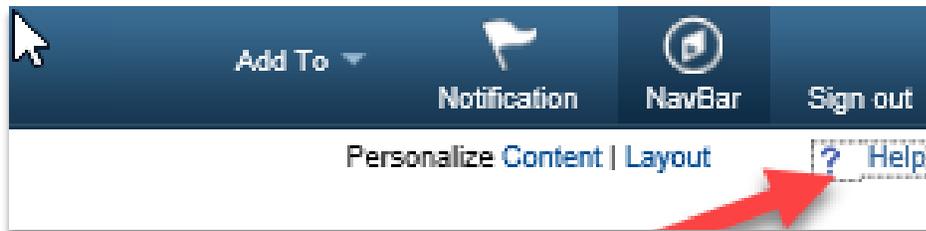




**School Admins**

| School/Unit | School Admin | Phone | Email |
|---|---|---|---|
| **Architecture** | Carolyn Buchanan | 4-6228 | ceb4gw |
| **BIMS** | Fay Miller | 4-2217 | jff3f |
| **Curry** | Dana Stanley | 4-7161 | dfb6n |
| **Engineering** | Joan Wicks | 4-4380 | jew9s |
| **GSAS** | Lloyd Banks | 4-3919 | lb3ne |
| **Nursing** | Julie Kusnerik | 4-1978 | jak8bz |
| **Batten** | Cindy Moore | 2-2033 | chm3b |

**DAUG Website**

http://sfs.virginia.edu/internal/deptaid
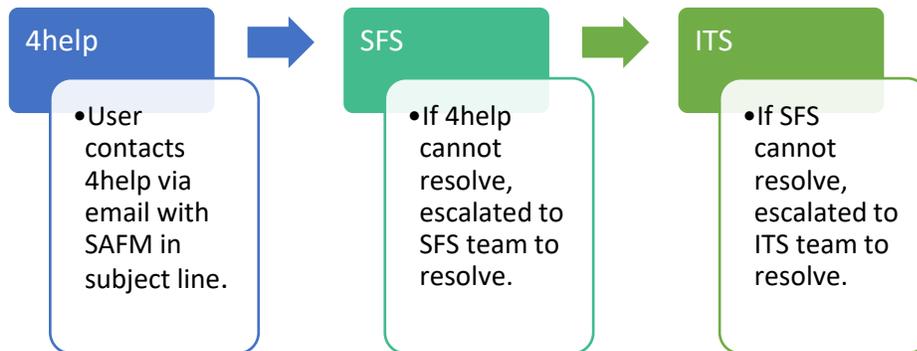
**DAUG Email List**

Let us know if someone needs to be added.

## DAUG Meetings

Should we take a Summer break or meet via Zoom over the summer?

## Additional Help

Send questions to 4help@virginia.edu; enter "SAFM" in subject line. Sending your questions to 4help@virginia.edu ensures that we are able to track the issues and analyze the types of questions asked.

| 4help | SFS | ITS |
|-------|-----|-----|
| • User contacts 4help via email with SAFM in subject line. | • If 4help cannot resolve, escalated to SFS team to resolve. | • If SFS cannot resolve, escalated to ITS team to resolve. |