DAUG MEETING

Topics

- Important Dates
- Summer Reminders
- SAFM 2021-22: Reminders
- Questions for SAFM in 2021-22
- FST Update
- SAFM Access
- Getting Help: Resources and Contacts

Important Dates

Calendar Item	Date
April 2021 stipend disbursement	March 23, 2021
2021 Summer Tuition Calc'ed	April 2, 2021
Graduate Summer Enrollment	April 8, 2021
SAFM/DA Open for Summer 2021 (1216)	April 16, 2021
SAFM/DA Open for 2021-22 (1218,1221,1222)	May 4, 2021
Graduate Fall Enrollment	May 16, 2021
June Stipend disbursement	May 21, 2021
Last Day to Get Entries in SAFM before Summer 1 due date	May 21, 2021 (shows as anticipated aid)
Finals Weekend (Graduation)	Friday, May 21 - Sunday, May 23, 2021
Summer Term Begins	May 24, 2021
Summer Session Calendar	https://summer.virginia.edu/calendars
Last Day to Process Changes in SAFM for FY21	June 21, 2021
Last GA Interface to Oracle for FY2021	June 23, 2021 (morning)
2021 Fall Tuit Calc'ed (waivers go from $1 to amt)	est July 9, 2021
Aetna Student Health Ins Website Opens	est July 20, 2021
Fall Term Charges Notification	est July 16, 2021
Aetna Website Last Day to Enroll/Waive	August 30, 2021
Fall Financial Aid Disburses	est Aug. 16, 2021
Fall Tuition Due Date	est Aug. 18, 2021
Fall First Day of Classes	August 24, 2021
Students w/Past Due or No Enrollment Cancelled (TBD)	September 9, 2021
Health Insurance Charges Posted	September 30, 2021
Health Ins Subsidy Fall Disbursement	October 1, 2021

Stipend Disbursement Dates May 2021-August 2022

Stipend	Disb Date
May 2021	4/23/2021
June 2021	5/21/2021
July 2021	6/17/2021
August 2021	7/23/2021
September 2021	8/23/2021
October 2021	9/23/2021
November 2021	10/22/2021
December 2021	11/19/2021
January 2022	12/17/2021
February 2022	1/21/2022
March 2022	2/23/2022
April 2022	3/23/2022
May 2022	4/22/2022
June 2022	5/23/2022
July 2022	6/16/2022
August 2022	7/22/2022

Summer Reminders

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			
2020-21	1216	2021	Tuition–Summer 1	May 21, 2021	2020-21
2021-22	1216	2022	Tuition–Summer 2	July 16, 2021	2021-22
		Stipend Awards			
2020-21	1216	2021	Stipends - June	May 21, 2021	2020-21
2020-21	1216	2021	Stipends - July	June 17, 2021	2020-21
2021-22	1216	2022	Stipends - August	July 23, 2021	2021-22

In the summer, you can award students in either Summer 1 (Fiscal Year 2021, term 1216) or Summer 2 (Fiscal year 2022, term 1216). 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 either Summer 1 **or** Summer 2. Not both.

Exception: If you need to pay part of the student's tuition from a PTAEO in FY2021 and part from a PTAEO in FY2022, then you should use a limited package in Summer 1 and a limited package in Summer 2.

SAFM 2021-22: Reminders

Reminder: Rollover Targets

Setup your targets for 2021-22. 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.

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

We are opening SAFM for 2021-22 in May 2021, 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.
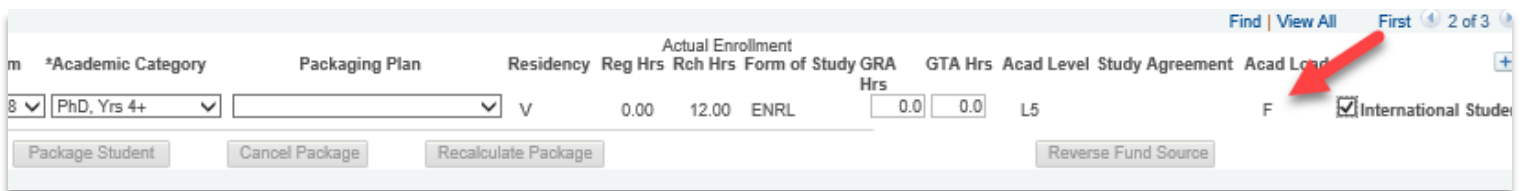
Spring will assume the same information as fall.

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 has been added to the page. **F** indicates that the student has an approved academic load of full-time. **P** indicates that the 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.

**For 2021/2022 there will be two rates for health insurance. SAFM will be modified to reflect the 2 rates. One rate will apply to students who participated in 2020/2021 health insurance and one rate will apply to new students who did not participate in 2020/2021. More to come about how this will work.

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.

Questions for the New Year

There are a handful of topics which we would like to hear some feedback:

- GSAS will start a new five-month stipend going from August-December. Would other schools find this useful?
- Disbursement dates are currently defaulted to the 23rd of each month. Is there interest in moving it to the 15th?
- Fall rates are close to being completed. We expect to move 21/22 in no later than 5/4; is this too late for anyone?

FST Update

The FST team has a list of worktag fields that will make up the FDM (Chart of Accounts) but is still working on finalizing the fields. Here is the current list of the FDM fields in the new chart of accounts.

Worktag	Purpose	Naming Convention	Max. Field Length
Company	Each division represented in Management Discussion & Analysis (MD&A) schedules of financial reports; considered primary level at which one holds balanced set of books	UVA_XXX (Legacy HCM)	7 waiting on confirmation
Cost Center	Area that owns a subset of revenues and/or expenses to support management decision making or accountability	CC1234	10
Fund	High-level source of funds used to support GASB net position categories and state reporting requirements	FD123	5
Gift	Pledges, outright contributions received from private sources, or activities supported by an external party (i.e., donor)	GF123456	8
Grant	Meets UVA's policy definition of a sponsored program (e.g., federal, state, local and private)	GR123456	8
Project	Activity that has a defined start and end date (e.g., capital or IT project), multiple funding sources and hierarchy	PJ12345	7
Program	Defined at the school/unit level, Program captures activities or initiatives that are generally consistent over time (no definite start or end date), broad in nature, and typically spans across multiple cost centers, funding sources, projects and activities.	PG12345	7
Location	Represents physical locations to track assets and workers. Also used on operational transactions for identified use cases, such as tracking facilities-related costs for areas such as Athletics and Business Operations.	1001 EMMET	19 To confirm
Region	Reserved for future use in Medical Center deployment	TBD	7
Business Unit	Generate statement of net position, SCRECNA at a lower level than Company	BU12	4
Assignee	Allows tracking by individual; for identifying and reporting on financial activity and balances for which the individual is responsible (e.g., faculty, grad students)	123456789 (WD ID)	9
Function	Used to categorize activities by mission; supports NACUBO, GASB and state reporting requirements	FN123	5
Designated	Represents funding other than gifts and grants such as discretionary, startup, state appropriations, ETF, including earned revenue such as tuition and Facilities & Administrative (F&A)	DN123456	8
Activity	Envisioned as managerial reporting tool only, defined at school level; used to assign further granularity to programs and/or projects	AC12345	7
Loan	To track internal loans provided by the Internal Bank	LN123	5
Internal Reference	Track the various units' internal reference numbers on transactions in Workday	Ex IRFMxxx	15

The SIS team has been meeting with the FDM team and is still in discussions about how these worktags will be used in SIS. Loan will not be used in SIS.

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
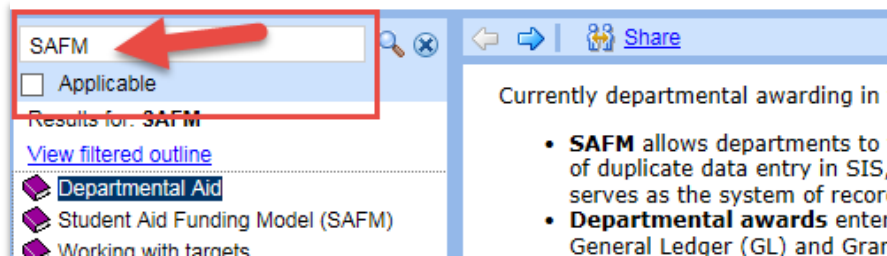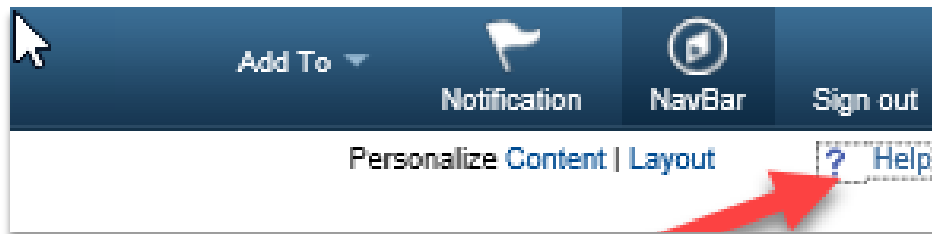
School Admins

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
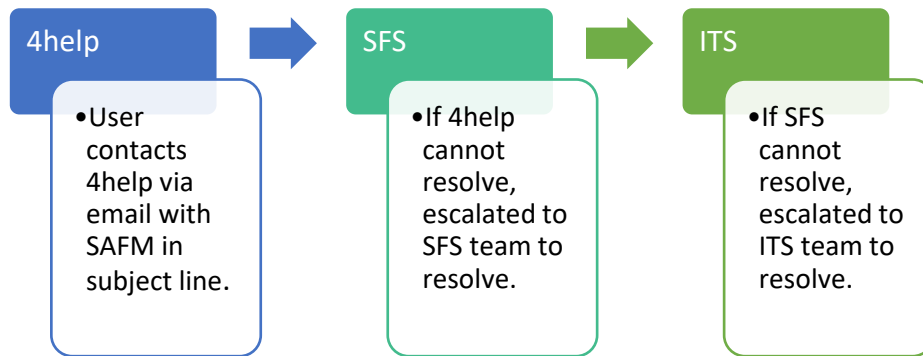http://sfs.virginia.edu/internal/deptaid

DAUG Email List
Let us know if someone needs to be added.

DAUG Meetings

Recurring meetings, second Wednesday of each month @ 3:30pm. There will be a break for 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.