

## Topics

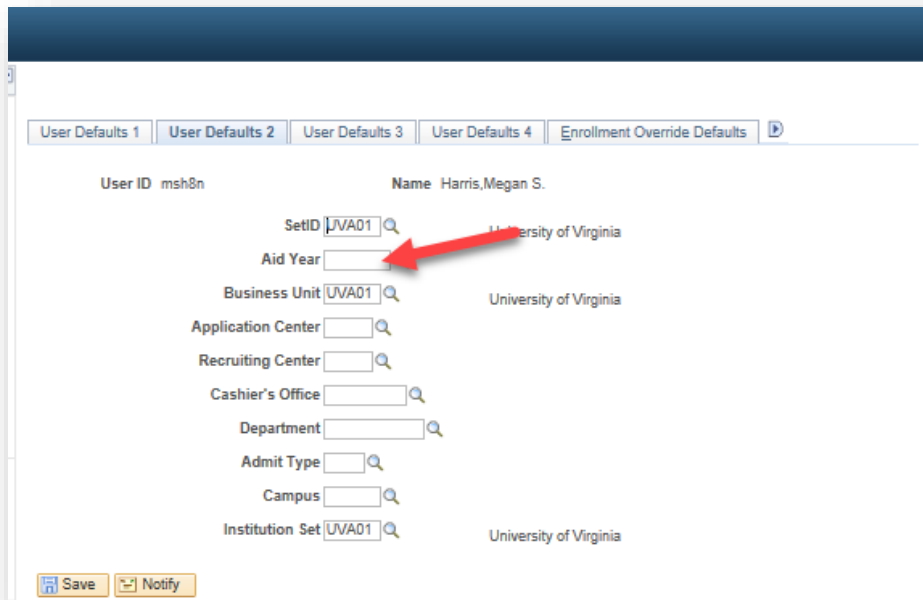
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## Introductions, Important Dates, News/Announcements from SFS

- Important dates for 2017-18: <http://sfs.virginia.edu/internal/deptaid>

## 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.
- If the Aid Year in User Defaults 2 left blank, the value in SAFM will be defaulted based on the current date. *(If there is no value, the default the Aid Year value based on the current system date.)*



The screenshot shows the 'User Defaults 2' tab in the SFS system. The user ID is 'msh8n' and the name is 'Harris, Megan S.'. The 'Aid Year' field is highlighted with a red arrow, indicating it is the focus of the reminder. Other fields include 'SetID' (UVA01), 'Business Unit' (UVA01), 'Application Center', 'Recruiting Center', 'Cashier's Office', 'Department', 'Admit Type', 'Campus', and 'Institution Set' (UVA01). The 'Save' and 'Notify' buttons are visible at the bottom.

## SAFM Reporting: Reminder, Transition to UBI

- Reminder: SAFM and DA reports are transitioning to UBI
- The planned sunset for Discoverer SIS reporting: December 31, 2017.

## SAFM Post Integration Fixes: Prevent Notes 4000 Characters or Greater in Length

- Managerial Reporting started working on pulling SAFM into QlikView. Notes field was too long; caused issues. SAFM now prevents users from saving notes fields that are greater than 4000 characters. This should not cause an issue for you (in the history of SAFM, only one note was 4000 characters or greater, but just wanted to let you know about this, in case you see the message).

Notes fields:

SAFM - Award student

**Student Awards**

ID: [REDACTED] Name: [REDACTED] Total Financial Aid: \$29,230.00

Fiscal Year: 2018 Career: Graduate Program: CUG Plan: EDUC-PHD Sub-Plan: CURIN6-CON

Current Residency: V Gender: Female Exp Grad Term: 1212 Acad Group: EDUC

Student type: Student Notes: [REDACTED]

Program Action: MATR

Find | View All First 1 of 2 Last

*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 Year 4	Qualified GRA/GTA 100% Fall	V	0.00	12.00	ENRL	10.0	10.0	40	<input type="checkbox"/> International Student

Package Student Cancel Package Recalculate Package Reverse Fund Source

8500000000000 Wages Amt: 9000.00 Notes: [REDACTED] Award Status: Processed

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1131155	CU-Curr Instr & So Ed	CU-CISE Instruction	SS00425	143427	2200		4500.00	50.00	GRA	Processed	<input type="checkbox"/>

If you enter 4000 or more characters, a message like this will display:

Message

The length of this field's value (4794) exceeds the maximum field length of 4000.

OK

- Also, if you entered a note on the SAFM Awarding Page, but then pulled up that award on the SAFM Award Status page, notes did not display there; this has been corrected. Notes on Student Awarding:

SAFM - Award student

**Student Awards**

ID: [REDACTED] Name: [REDACTED] Total Financial Aid: \$2,332.34

Fiscal Year: 2018 Career: Graduate Program: ASG Plan: ASTRON-PHD Sub-Plan: COSMO6-CON

Current Residency: V Gender: Male Exp Grad Term: 1202 Acad Group: CGAS

Student type: Student Notes: [REDACTED]

Program Action: DATA

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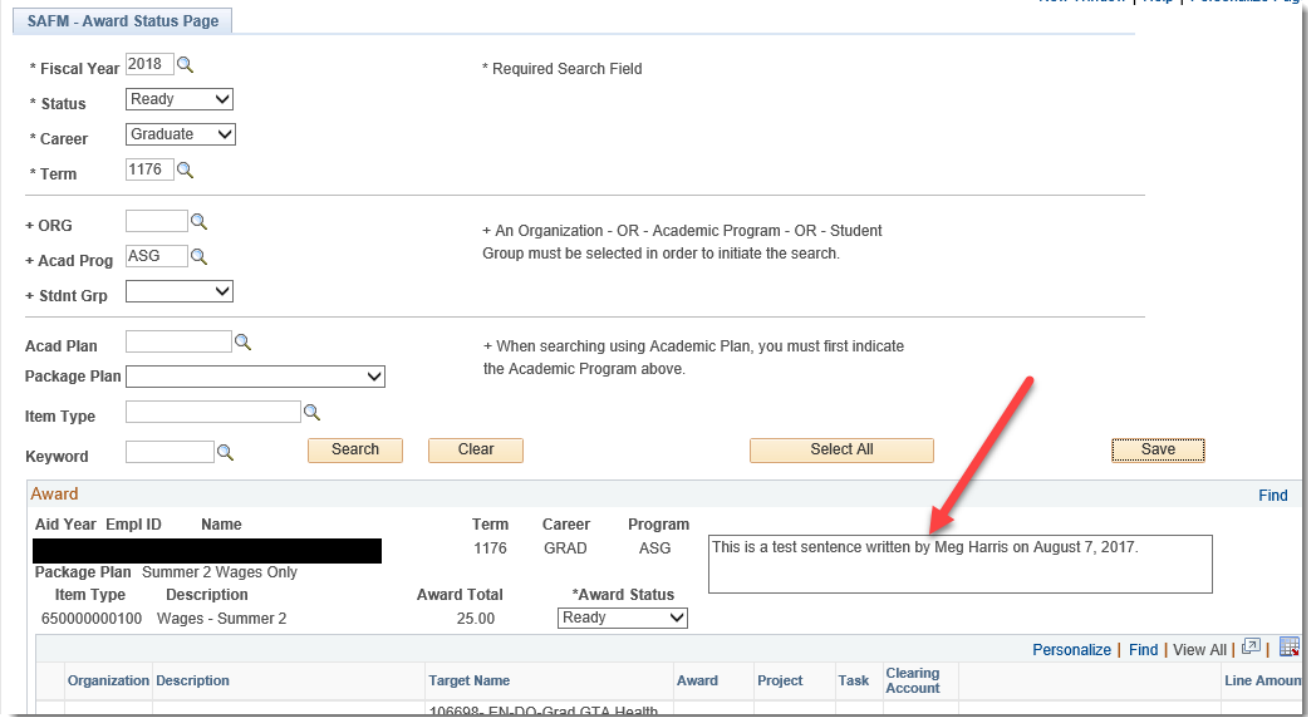
*Term	*Academic Category	Packaging Plan	Residency	Reg Hrs	Actual Enrollment Rch Hrs	Form of Study	GRA Hrs	GTA Hrs	Acad Level	Study Agreement
1176	Full Time Researc	Summer 2 Wages Only	V	0.00	0.00	ENRL	0.0	0.0	L5	<input type="checkbox"/> Internat

Package Student Cancel Package Recalculate Package Reverse Fund Source

650000000100 Wages - Summer 2 Amt: 25.00 Notes: This is a test sentence written by Meg Harris on August 7, 2017. Award Status: Ready

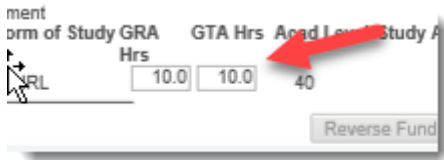
Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund :
10000	Full Time Researc	Full Time Researc	10000							

Same as on Award Status page:

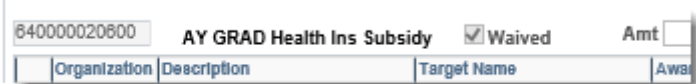


Review: Health Insurance

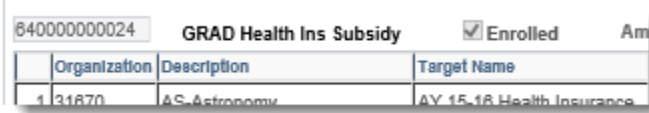
- Reminder: In SAFM, grad health is added when the package student button is pushed, but it is NOT in the package. This was intentional so that when the package is cancelled, the health insurance is not automatically cancelled.
- Health insurance item types are disburseable item types that only pay health insurance charges owed on students' accounts.
- You are able to enter any amount (but the standard rate will auto-populate). The standard rates are:
  - Academic Year Health Subsidy Amount - \$2,690.00
  - Spring Only Amount - \$1,666.00
- You are able to cancel the health insurance award regardless of whether the student has accepted the insurance unless the student is in a qualified GRA/GTA package.
- You should cancel a health award the same way you cancel stipends (zero out the amount and move the reversal through the workflow).
- Note: IF you cancel the entire GRA/GTA package, and also wish to cancel the health insurance you will need to zero out the GRA/GTA hours.



- "Enrolled" or "Waived" – these will be visible/checked to indicate if the student enrolled or waived.

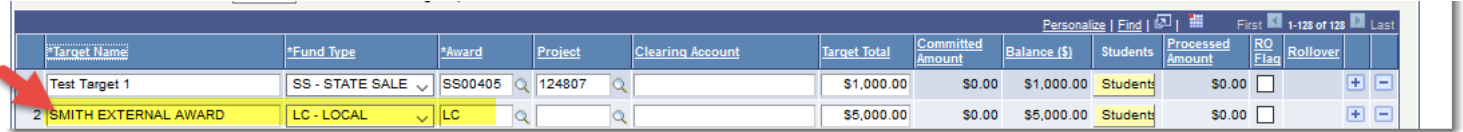


640000020600	AY GRAD Health Ins Subsidy	<input checked="" type="checkbox"/> Waived	Amt
	Organization	Description	Target Name



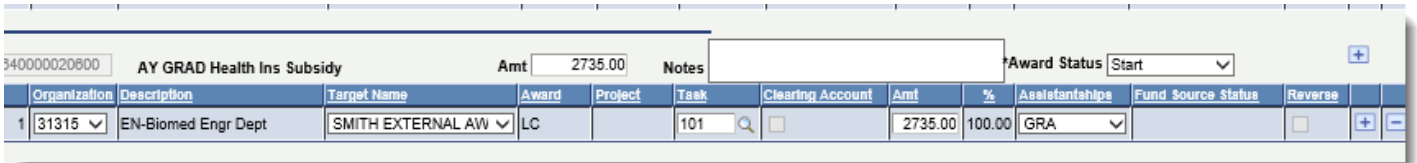
640000000024	GRAD Health Ins Subsidy	<input checked="" type="checkbox"/> Enrolled	Amt
	Organization	Description	Target Name
131870	AS-Astronomy	AY 15-16 Health Insurance	

- If you would like to fund a graduate student’s health insurance subsidy with an external award (such as a Jefferson award):
  - Enter the external award on the Target Page (you must enter information for the Fund Type and Award, see below):



Target Name	Fund Type	Award	Project	Clearing Account	Target Total	Committed Amount	Balance (\$)	Students	Processed Amount	RO Flag	Rollover
Test Target 1	SS - STATE SALE	SS00405	124807		\$1,000.00	\$0.00	\$1,000.00	Student	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
2 SMITH EXTERNAL AWARD	LC - LOCAL	LC			\$5,000.00	\$0.00	\$5,000.00	Student	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>

- Award the external award on the SAFM awarding page
- Do not move it past Start.
- Note: GSAS users can use the Funded Line–Custom package so that the fund source will not be defaulted.



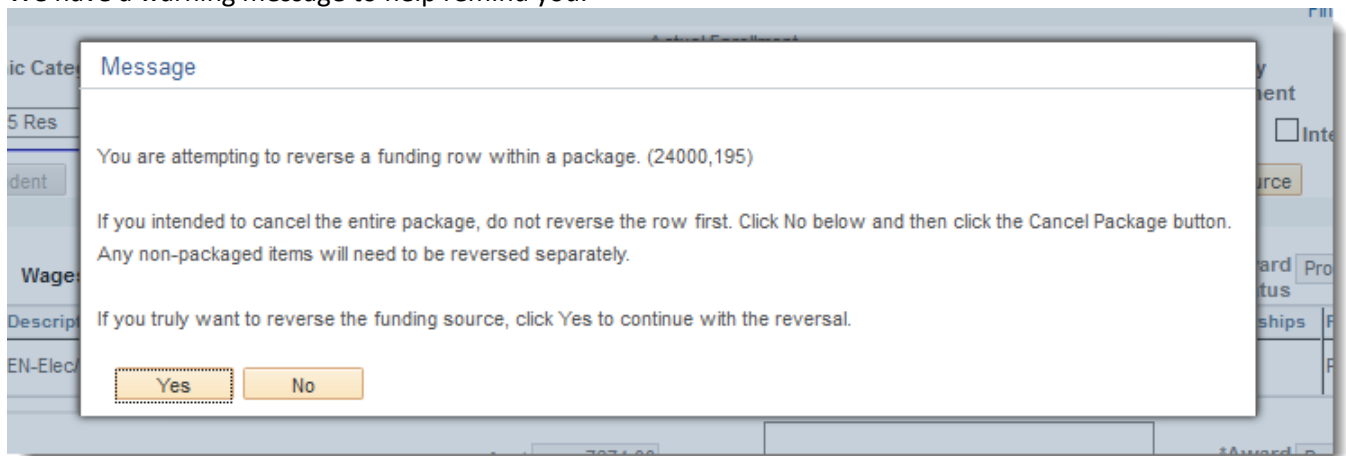
Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Abelsafanship	Fund Source Status	Reverse
31315	EN-Biomed Engr Dept	SMITH EXTERNAL AW	LC		101		2735.00	100.00	GRA		<input type="checkbox"/>

### Non-SAFM Schools Only: Instructions for Entering Health Insurance Subsidy Awards

- Reminder: The health insurance subsidy awards for fall and spring no longer change from \$1 to the amount; you will need to enter the actual amount instead.
- If you award any students the health subsidy for the academic year or for spring only, you will need to enter the actual amount (not \$1). The rates are:
  - Academic Year Health Subsidy Amount - \$2,690.00
  - Spring Only Amount - \$1,666.00
- Done to accommodate pro-rated amounts.

### Review: Reversals vs. Cancel Package

- Based on feedback we have received, we wanted to review reversing a fund source vs. cancelling a package.
- If you just need to change the source of the funding (the target/PTAEO), then you should reverse the fund source and move the offset entry through the workflow. (For GSAS, this only applies when the funding has not been defaulted.)
- If the student truly needs a different package, then click Cancel Package and proceed.
- If you cancel a package by accident and save, you will need to move the cancelled package elements through the workflow to approved and then repackage.
- We have a warning message to help remind you:



**Message**

You are attempting to reverse a funding row within a package. (24000,195)

If you intended to cancel the entire package, do not reverse the row first. Click No below and then click the Cancel Package button. Any non-packaged items will need to be reversed separately.

If you truly want to reverse the funding source, click Yes to continue with the reversal.

## SAFM Future Enhancements: Health Insurance

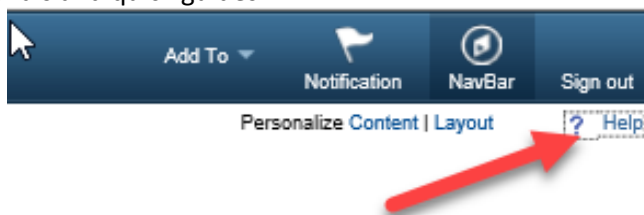
- Tuition is approved in late fall, but health insurance rates are not approved until the spring. We understand that you need to be able to award students in SAFM *before* health insurance rates are approved.
- In order to be able to open SAFM for the next year earlier (February), we are making changes to SAFM for 2018-19 (not this current year, but for NEXT year). We plan to open SAFM earlier, with an estimated health insurance amount.
- More information to come...just wanted to give you a heads up!
- *In case there are questions, here are the specific details on what we plan to do:*
  - ensure that health insurance cannot be moved past Start status until the health insurance rate is approved.
  - be able to change the health insurance amount should we need to.
  - exclude the health insurance item types from interfacing to SAFM. (These item types will not interface from SAFM to the Departmental Aid area until the health insurance rate has been approved.)

## GSAS 2018 Enhancements: Overview, Instructions

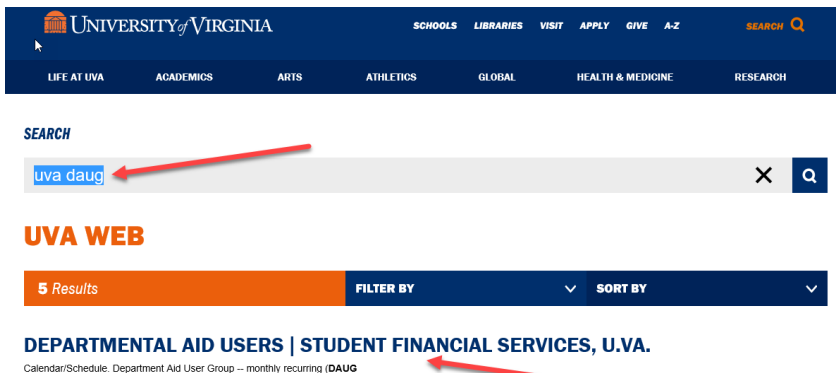
- Back in May, we offered a training session on the GSAS changes for 2018.
  - Stipends are now included in packages
  - Wage and stipend amounts are defaulted
  - Fund sources not editable (they are “locked down”)
- Now that you are more “in the thick” of awarding, that document can be found on the DAUG website.
- Information specific to health insurance is included.
- May 2017 GSAS SAFM Training presentation: <https://sfs.virginia.edu/sites/sfs.virginia.edu/files/5-3-2017%20SAFM%20Training%20-%20GSAS.pdf>

## Reminder: How to Get 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>. Regularly updated and includes these and other DAUG meeting notes, important dates, links to quick guides, etc. Note: You can also search on the UVA website to find the site:



- Contact your School Admin/Local Expert via email or phone.

School/Unit	School Admin	Phone	Email
GSAS	Lloyd Banks	4-3919	lb3ne@Virginia.EDU
Curry	Katie Walker	3-4585	kwalker@virginia.edu
Engineering	Joan Wicks	4-4380	jew9s@virginia.ed
BIMS	Fay Miller	4-2217	fmliller@virginia.edu
Nursing	Adam Seid	4-0067	ads8n@Virginia.EDU
Architecture	TBD	4-6442	tbd

- Attend the monthly DAUG meetings. These typically occur on the second Wednesday of the month at 3:30pm.
- Send email to [4help@virginia.edu](mailto:4help@virginia.edu), please use **subject line: "SAFM"**. You do not need to copy anyone.
- 4help tickets are automatically routed: once you send the email, the help desk routes it to SFS. If SFS is unable to resolve/it is a true system issue, it is then escalated to the Financial Aid team in ITS.
- We kindly ask that you please do not send emails to individuals in SFS or ITS directly. Sending your questions through 4help ensures that we are able to track the issues as well as analyze the types of questions you are sending. Additionally, if someone is out of the office, your email is routed to others who can help.
- We have seen very rare instances of the helpdesk incorrectly routing or incorrectly solving a ticket; IF this happens to you, let us know immediately so we can correct it and ensure it does not happen again.



# Questions?

