

DAUG MEETING

Topics

- Important Dates
- FYI: SIS User Interface Enhancements
- Reminder: Default SAFM Fiscal Year
- Health Insurance
- AY Activation Issues, Non-Degree Students
- Reminder: Withdrawn Students
- Updating Your Name in SIS
- Recent SAFM Fixes & Enhancements
- SAFM Org Access Audit/Clean-up
- Getting Help: Resources and Contacts



Important Dates

Calendar Item	Date
SAFM/DA Open for 2019-20 (1196,1198,1201,1202)	March 14, 2019
2019 Summer Tuition Calculated	Mid-March 2019
Last Day to Get Entries in SAFM for Summer 19	Mid-May 2019
Summer Session	https://summer.virginia.edu/calendars
Last Day to Process Changes in SAFM for FY19	June 19, 2019
Last GA Interface to Oracle for FY19	June 20, 2019 (morning)
2019 Fall Tuition Calculated	July 5, 2019
Aetna Student Health Insurance Website Opens	Mid-July 2019
Fall Term Charges Notification	July 23, 2019 (GRAD, UGRD, LAW)
Fall Financial Aid Disburses	Aug. 19, 2019 (GRAD, UGRD, LAW)
Fall Tuition Due Date	Aug. 21, 2019 (GRAD, LAW2, UGRD)
Fall First Day of Classes	August 27, 2019
Students w/Past Due or No Enrollment Cancelled	September 3, 2019
2019 SAFM/DA Closes for 2018-19 Entry	September 16, 2019
2019 Fall Health Insurance Appeal Deadline	September 16, 2019
Aetna Website Last Day to Enroll/Waive for 2019	September 19, 2019
2019 Fall Health Insurance Charges Placed in SIS	September 27, 2019
2019 Health Insurance Subsidy Fall Disbursement	October 1, 2019
2019 Fall Health Insurance Due Date	October 31, 2019
2020 Spring Tuition Calcs (waivers from \$1 to tuit)	Early November 2019
2020 Spring Entries Should be "Approved" in SAFM	Early December 2019

2020 Spring Financial Aid Disburses	Early January 2020
2020 Spring Tuition Due	Early January 2020
2020 Spring First Day of Classes	January 14, 2020
2020 Health Insurance Subsidy Spring Disbursement	January 15, 2020
2020 Spring Students w/ Past Due, No Enrlmnt, Cxl'ed	Mid-January 2020 (determined by SFS)
SAFM/DA Open for 2020-21 Entry	Mid-March 2020

Stipend	Disbursement Date
for September 2019	August 23, 2019
for October 2019	September 23, 2019
for November 2019	October 23, 2019
for December 2020	November 19, 2019
for January 2020	December 17, 2019
for February 2020	January 23, 2020
for March 2020	February 21, 2020
for April 2020	March 23, 2020
for May 2020	April 23, 2020
for June 2020	May 22, 2020
for July 2020	June 18, 2020
for August 2020	July 23, 2020

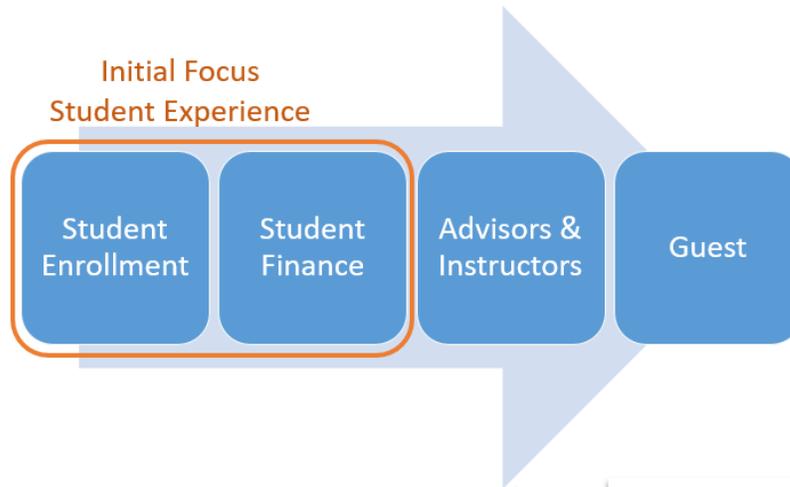
If you have questions about how you should key wages in SAFM, please contact your School Admin as each school may have a different business process.

From		To	Pay Date
5-Aug	1	18-Aug	23-Aug
19-Aug	2	1-Sep	6-Sep
2-Sep	3	15-Sep	20-Sep
16-Sep	4	29-Sep	4-Oct
30-Sep	5	13-Oct	18-Oct
14-Oct	6	27-Oct	1-Nov
28-Oct	7	10-Nov	15-Nov
11-Nov	8	24-Nov	29-Nov
25-Nov	9	8-Dec	13-Dec
9-Dec	10	22-Dec	27-Dec
23-Dec	11	6-Jan	10-Jan
6-Jan	12	19-Jan	24-Jan
20-Jan	13	2-Feb	7-Feb
3-Feb	14	16-Feb	21-Feb
17-Feb	15	1-Mar	6-Mar
2-Mar	16	15-Mar	20-Mar
16-Mar	17	29-Mar	3-Apr
30-Mar	18	12-Apr	17-Apr
13-Apr	19	26-Apr	1-May
27-Apr	20	10-May	15-May
11-May	21	24-May	29-May
25-May	22	7-Jun	12-Jun
8-Jun	23	21-Jun	26-Jun
22-Jun	24	5-Jul	10-Jul
6-Jul	25	19-Jul	24-Jul
20-Jul	26	2-Aug	7-Aug

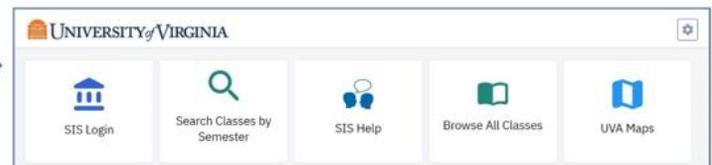
FYI: SIS User Interface Enhancements

- As you may have heard, ITS and UREG have been working with HighPoint, a third-party vendor, to develop improved tools to help students find and enroll in classes.
- Phase 1 – Student Enrollment.
- Originally planned to implement an improved Class search in spring 2019.
- Scope expanded early in 2019 to develop a more comprehensive new interface for our student information system (SIS) and focused improvements on student enrollment.
- Current Target – fall 2019, after students have finished enrolling in fall courses and before they begin enrolling for spring.

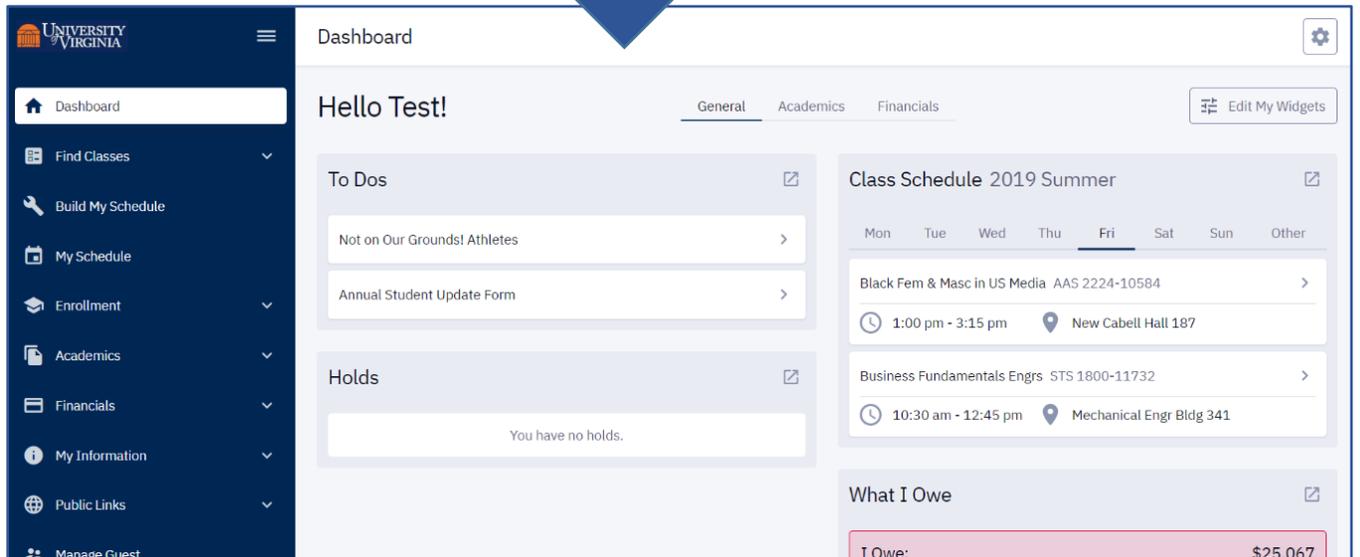
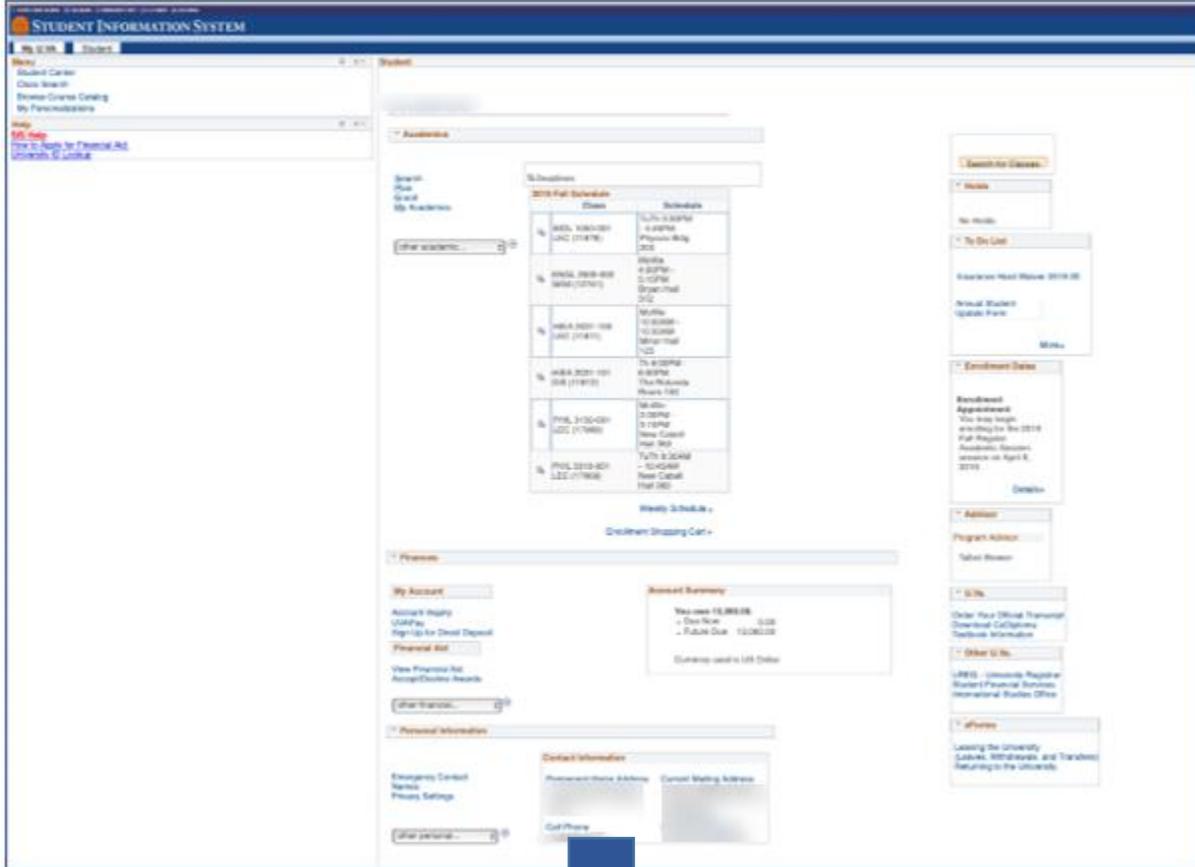
Phased Rollout



Login – Current vs New

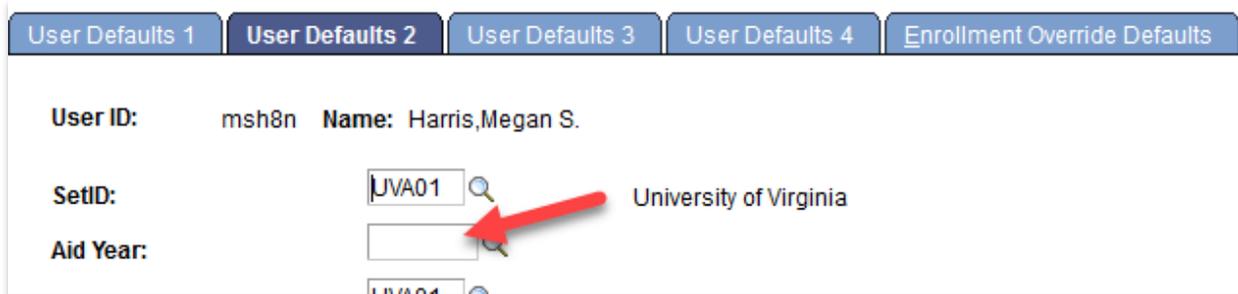


Landing Page – Current vs New



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.
- **Note:** If you are both an employee and a student you, the 2020 default that you entered will flip back to 2019 each night. You will need to reset the user default each day until **August 19, 2019**.



The screenshot shows a web interface with five tabs: 'User Defaults 1', 'User Defaults 2', 'User Defaults 3', 'User Defaults 4', and 'Enrollment Override Defaults'. The 'User Defaults 2' tab is active. Below the tabs, the following information is displayed:

- User ID: msh8n Name: Harris, Megan S.
- SetID: JVA01 University of Virginia
- Aid Year: [empty]

A red arrow points to the 'Aid Year' field, which is currently empty.

Health Insurance

General Reminders

- UVa will post the Aetna Student Health Insurance plan annual premium to the SIS accounts of students who enrolled, failed to submit adequate documentation, or whose health plans were determined not to provide comparable coverage in late September.
- Students may receive an additional email from SFS about activity on their student account regarding this charge.
- Graduate students receiving the health insurance subsidy from their department do not need to make payment as the subsidy will pay the charge in SIS. (FYI - if the student is uncertain whether they are receiving a health insurance subsidy, they are told to contact their school/department directly.)

Reminder: Entering Health Insurance in SAFM

- 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 can enter any amount (but the standard rate will auto-populate).
- You can 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).
- "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
			Awa

640000000024	GRAD Health Ins Subsidy	<input checked="" type="checkbox"/> Enrolled	Amt
	Organization	Description	Target Name
1 131870	AS-Astronomy		AY 15-16 Health Insurance

Reminder: Cancelling Health Insurance in SAFM (Waived)

- Scenario: Department entered health insurance for student, moved it to approved, and the award is now processed. However, the student waived their health insurance. The department needs to reverse the entry and move it through the workflow.
- To find these students: run UBI SAFM Award Status Report, look for health insurance in Error, Error Reason, “Subsidy award was declined when award status is in processed.”
- Find the student’s award on the SAFM Awarding page; reverse the award and move it through the workflow.

User Question: Student Charged in Spring, Award Entered in Fall

- Question: Student was charged in the spring, but the department entered the health subsidy in the fall. Why did the award entered in the fall not pay the spring charge?
- Answer: Health insurance awards won't pay forward, so you'll need to cancel the fall award and enter it as a spring award. They will pay backward (so if the charge was in fall, and you entered a spring award, it will pay the fall), but it doesn't work to pay in fall and have the charges in spring.

Health Insurance QLEs

- In SAFM, we have a process that runs for a set amount of time in fall and spring that updates a field to indicate if a student has enrolled in or waived health insurance:

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

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

- However, if the student has a Qualifying Life Event later (example: they age out of their parent’s health insurance mid-year and wish to enroll in UVA’s student health plan), the field indicating that the student waived/enrolled was not being updated.
- So, if you added a health insurance award AFTER our process stopped running for the term, the field indicating that the student has waived or enrolled was not updated.
- Last year, we made changes so that the SAFM Awarding Page more accurately reflects the student’s health insurance acceptance status.
- On the SAFM Student Awarding page for fall, spring, or summer: If the student enrolls and has been charged, the system will update the term in SAFM associated with the charge to enrolled and update the award amount. If the students waives health insurance, the health insurance checkbox will be set to waived. (If waived in fall, spring will also display as waived, unless the student had a QLE).

- When you come into SAFM, if the checkbox has changed from enrolled to waived or waived to enrolled: reporting will mirror SAFM only AFTER you have saved the change in SAFM.

Spring Health Insurance Charge Disbursement Date Changed

- We have changed the spring health insurance disbursement date to resolve an issue that you let us know about.
- Scenario: Student was not funded in the fall; they paid the full health insurance amount out of pocket. Then, in the spring, the student was funded. The amount you entered in SAFM for the spring health subsidy item type went back and paid towards fall BUT the student had to wait until 3/1 for the refund on the money that they paid out.
- Students wanted a refund faster than the 3/1 disbursement date.
- Starting in 2020, we have changed the spring health insurance disbursement date to be mid-January.
- It will NOT disburse if the student does not have a charge.

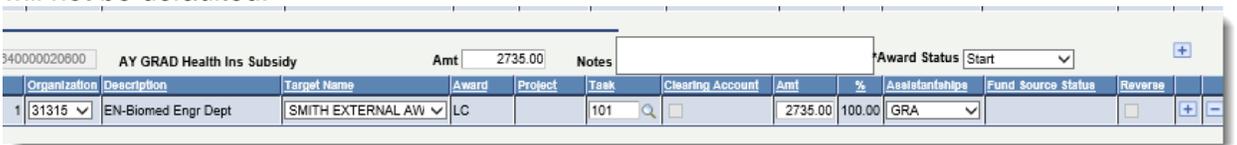
Awarding Health Insurance with an External Award

- If you would like to fund a graduate student’s health insurance subsidy with an external award (example: 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	%	Abolofanfahips	Fund Source	Status	Reverse
1 31315	EN-Biomed Engr Dept	SMITH EXTERNAL AW	LC		101		2735.00	100.00	GRA			<input type="checkbox"/>

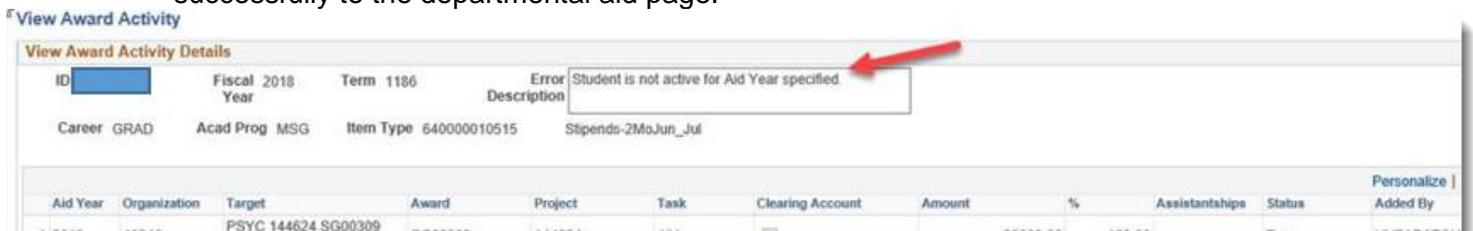
AY Activation Issues, Non-Degree Students

- If you need to award non-degree students and they do not display in the SAFM search (you are not able to pull them up to award them), please send an email to 4help@virginia.edu (SAFM in subject line). SFS will manually AY activate (and build their FA term) so that you may enter their awards.
- If you have any other student or applicant and the award is set to error in SAFM with the error reason of “Student is not Active for Aid Year Specified” – contact 4help@virginia.edu (SAFM in subject line). Sometimes, we see these errors in summer because a user has attempted to award a student in the summer in next aid year. The

student is active and was awarded in the prior aid year (fall/spring) but has not been aid year activated in the next aid year yet (summer).

Background

- For matriculated students to be available for awarding in SAFM, they must be aid year activated.
- Admitted applicants are available for awarding in SAFM, even if they are not aid year activated. *If they are not aid year activated, they would be set to error in SAFM overnight when the awards are interfaced from SAFM to the departmental awarding page. **But**, ITS (SIS team) is running processes to ensure that applicants and students are aid year activated so that issue should be minimized.
 - We nightly aid year activate any BUSN, GRAD, or MEDS student who is active in records in one of these Programs: DAG, ARG, ASG, CPG, CUG, ENG, FBG, MCG, NRG, MDG.
 - We are aid year activating graduate admitted applicants (need to be offered admission).
- Here is an example of a summer aid year activation issue: An item type was entered and moved to approved on 3/28/2018 in FY2018 in SAFM (for the 1186 term). It came over to the departmental awarding page and tried to go into the 2019 aid year but the student was not aid year active for that year yet, so it errored. Once the student was active in records, an ITS process aid year activated the student; on 4/9/2019 the award interfaced successfully to the departmental aid page.



The screenshot shows a 'View Award Activity' window. At the top, there is a section for 'View Award Activity Details' with the following information: ID (redacted), Fiscal Year 2018, Term 1186, Error Description 'Student is not active for Aid Year specified' (highlighted with a red arrow), Career GRAD, Acad Prog MSG, Item Type 640000010515, and Stipends-2MoJun_Jul. Below this is a table with columns: Aid Year, Organization, Target, Award, Project, Task, Clearing Account, Amount, %, Assistantships, Status, and Added By. The first row of the table shows: 2018, PSYC, PSYC 144624 SG00309, [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted].

Reminder: Withdrawn Students

For withdrawn or cancelled students, please make sure to back out their awards in SAFM. You can run the SAFM Discrepancy Reports to help you identify these students.

Updating Your Name in SIS

- Employees and former students: To report a name change, contact 4help@virginia.edu. In this case, DO NOT put "SAFM" in the subject line. Please state exactly where you are seeing the former name (screenshots are always helpful).
- Current students (including current students who are also employees): the name change must go through the registrar's office. Here's their form: <https://uvaforms.virginia.edu/sites/formsdirectory.virginia.edu/files/name-id-change.pdf> and note that it must include documentation of the name change.

Recent SAFM Fixes & Enhancements



Health Insurance Amounts Populated in SAFM Incorrectly

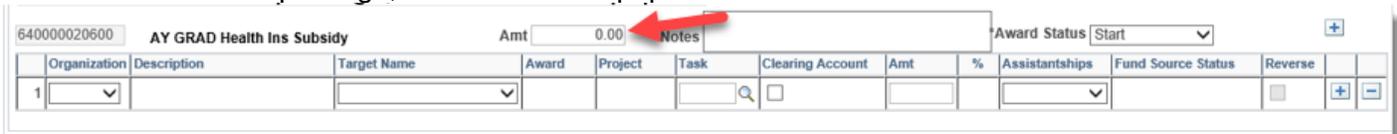
If you packaged a student in late July and the student had enrolled in health insurance, the health insurance amount that populated in SAFM would have been incorrect and you would have needed to manually enter the amount to be \$2814. This only affected a small population of users/students. This issue has been corrected; fall health insurance amount now should populate the \$2814 amount in SAFM.

If it was a GSAS package, the amount that populated would have matched the defaulted GSAS stipend or wage amount.



Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
					101		5000.00	100.00	GTA		

If it was a non-GSAS package, the amount that populated would have = 0.

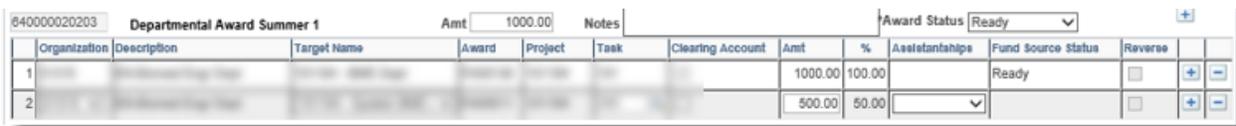


Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1							0.00				

Prevent Issues Associated with Adding Additional Fund Source Rows

For the first time, we were seeing issues with users attempting to add fund source rows at unusual times. We modified SAFM to prevent users from being able to do this in SAFM.

Example 1: User entered stipend award and fund source row and moved to ready. Then, the user added an additional fund source row \neq overall award amount and saved. Then, school admin moved award to approved via the award status page. This caused issues when the award interfaced to the departmental awarding page (since the sum of the PTAEO amounts \neq overall award amount). **Fix: Prevent users from saving fund source rows when the award is in In Review, Ready, Approved, Error, or Processed.**



Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1							1000.00	100.00		Ready	
2							500.00	50.00			

Example 2: As you can see, the award status is rejected, but the fund sources are a combination of processed, ready, and rejected. There was a very specific series of steps that ultimately created this issue, but the problem started when the user added a fund source row after the cancelled award was in the approved status. With cancelled packages, once the cancelled award is moved to approved and saved, the user can no longer change the award status. However, once this user added an additional fund source row, the system allowed the user to change the award status. Then the user performed a specific combination of actions which included moving the award to different statuses (ready or rejected), entering additional

fund source rows, entering PTAE0 information for some of the rows, and saving. **Fix: Once award is in approved status, if user enters a row, the award status will not be editable.**

Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse		
1							2792.00		GRA	Processed	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2							-2792.00		GRA	Ready	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
3							2792.00		GRA	Rejected	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
4							2792.00		GRA	Rejected	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
5										Rejected	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Fixes In Process

n/a

Enhancements Completed

Display Pop-Up Message on SAFM Student Awarding Page when Student's Situation Changes

- Background:
 - This scenario was brought up by a user last fall: User enters awards in SAFM for a student who they assume will be a full-time student in the coming semester. However, at some point between when user entered the funding and when the semester begins, the student’s form of study changes from enrolled to affiliated. Department no longer wishes for the student to be fully funded.
 - Typically, we recommend that users run discrepancy reports regularly to find these students and take the necessary actions of cancelling or modifying their awards. (See “Reminder: Enrollment Discrepancy Reports (UBI)” topic of the October DAUG meeting notes on the DAUG website for details/instructions.)
 - However, it was suggested that an informational pop-up message in SAFM would be helpful: When the user comes into the SAFM Awarding Page, display pop-up message on the awarding page if the student goes from a form of study of enrolled to affiliated.
 - We asked the users at the DAUG meeting in April 2019 if displaying the pop-up message would be helpful and they said yes; they also had a few additional requests.
- Request from the users:
 - A pop-up message display should display for students who have gone from enrolled to affiliated status, have graduated, or have been deactivated (withdrawn).
- This will not obviate the need to run the discrepancy report as usual. This is a just an added pop-up message that will inform the users of a change if they happen to be on the SAFM awarding page. You do not need to go student-by-student to see if a pop-up message appears. The reporting solution is (obviously) much more efficient.

Enhancements

In Process

Default New ARG Academic Categories that Include Design Tech. Fee

Students in Architecture can be defaulted/awarded with the “MA/MS” academic category. However, the amount set up for the MA/MS academic category does not include the design tech. fee permutations. So, the amount in SAFM will not match what the student is truly charged. There are three scenarios:

- MA/MS students who are not charged the MA/MS rate with no design technologies fee at all. (We are already accommodating this scenario in SAFM.)
- MA/MS students who are charged the MA/MS rate with a high design tech. fee. Students charged this fee are in the following plans; BS, MAR, LAND MLAR.
- MA/MS students who are charged the MA/MS rate with a low design tech. fee. Students charged this fee are in the following plans: LAN BUEP, PLAN MUEP, UNДАР ARU.

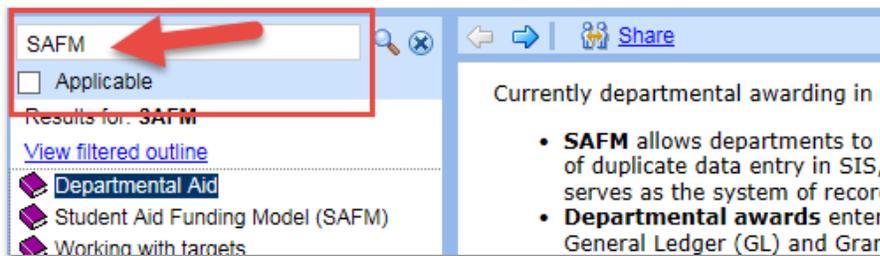
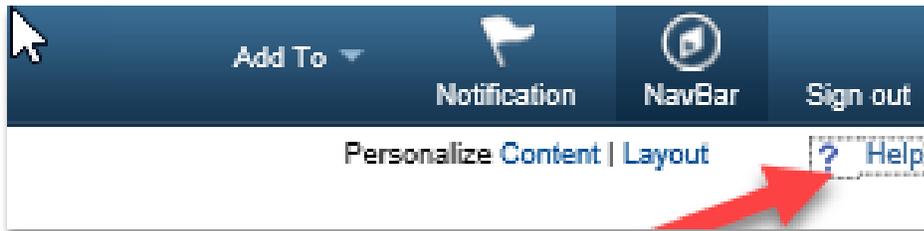
We will add additional academic categories to the setup and then modify SAFM so that the appropriate academic category based on what the student is being charged will be defaulted in SAFM.

SAFM Org Access Audit/Clean-up

- We are working on cleaning up SAFM org access; users that have left the University, have moved to another department, have the wrong level of org access, no longer need SAFM org access, etc.
- We contacted the School Admins regarding this, asking them if any SAFM org access changes need to be made for their respective school. We sent them a spreadsheet to update and also requested that they submit a request through esharp.
- Once we have heard back from all the School Admins and incorporated their changes, we will:
 - Remove SAFM org access **monthly** for users who do no longer have a SAFM role in SIS.
 - Contact School Admins **yearly** to review/update org access for their school.

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	4-7131	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

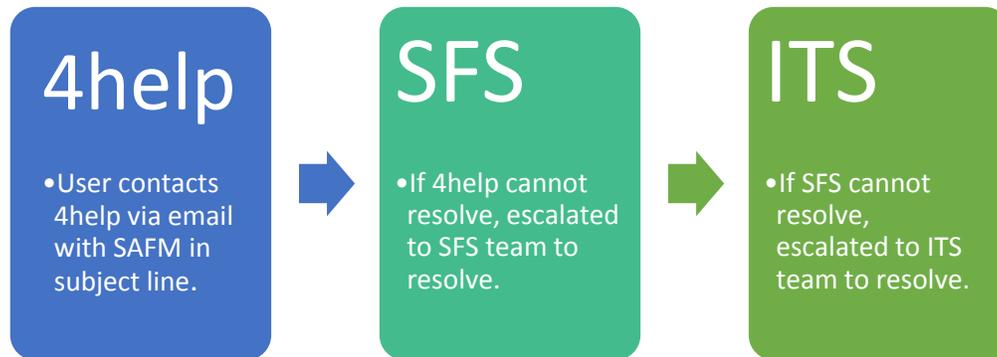
Users are added to this list once they are granted the SAFM role. If you know of someone who should be receiving these emails but is not, please let us know; we will add them.

DAUG Meetings

Recurring meetings (typically August – April), second Wednesday of each month @ 3:30pm.

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.



Questions?

