Topics

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News, Announcements, and Important Dates

- Review important dates for 2017-18 (available on the DAUG website): http://sfs.virginia.edu/internal/deptaid.
- Note: Date listed for SAFM opening for 2018-19 incorrect; SAFM open for 18-19 in mid-March.

Upcoming Enhancement: Health Insurance in 2018-19

- Background: The BOV approves graduate tuition in December, but we do not have the approved health insurance rates until the spring. In the past, we have not been able to open SAFM until health insurance rates are approved. Often, that has been late spring. For a variety of reasons, some schools would like to be able to award students in SAFM before health insurance rates are approved.
- New for 2018-19 awarding:
  - Until we have the approved rate, 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.
  - But, you will not be able to move the health insurance award past start (defaulted to Start status and grayed out).

640000020600	AY GRAD Health Ins Subsidy		Amt	2690.00	Notes					*Award Status	Start		
	Organization	Description	Target Name	Award	Project	Task		Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse
1	31315	EN-Biomed Engr Dept	101194 - BME Dept	FA00139	101194	101	🔍	☐	2000.00	74.35	GRA		☐
2	31315	EN-Biomed Engr Dept	101194 - Epstein BME :	FA00011	101194	101	🔍	☐	690.00	25.65	GRA		☐

- o We will also ensure that health insurance cannot be interfaced from SAFM to the Departmental Award area.
- o 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.
- o 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.

640000020600	AY GRAD Health Ins Subsidy			Amt	2735.00	Notes	(UPDATED RATE FOR DEMO PURPOSES ONLY)		*Award Status	Start			+
	Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse	
1	31315 ∨	EN-Biomed Engr Dept	101194 - Epstein BME ∨	FA00011	101194	101 🔍	☐	711.10	26.00	GRA ∨		☐	+ −
2	31315 ∨	EN-Biomed Engr Dept	101194 - BME Dept ∨	FA00139	101194	101 🔍	☐	2023.90	74.00	GRA ∨		☐	+ −

- • Note: The fund source amounts are updated based on the rounded % (25.65% to 26.00%; 74.35% to 74.00%).
- • General reminder: Grad Health is NOT in the package. In SAFM, grad health is added when the package student button is pushed, but it is not in the package. This was intentional; if a package is cancelled, the health insurance is not automatically cancelled.

Reminder: Selecting Packages, Understanding Tuition Awards

- • Please select the packaging plan that matches the student's funding situation. (Example: A graduate research assistant should be packaged with a GRA/GTA package; not with a Tuition & Fees 100% package.) If you are not sure which package to select, please check with your School Admin before awarding the student.
- • Background:
  - o A package refers to a predefined set of award elements that are used together. Packages are most often used when awarding an assistantship to a graduate student.
  - o The packages that are available to award are based on policies determined by UVa related to the different types of aid that are awarded by departments.
  - o Depending on the package selecting, the following awards/item types are added:
    - ▪ Tuition Remission (awarded to GRAs/GTAs) - the in state portion of the tuition and all fees.
    - ▪ Tuition Adjustment (awarded to GRAs/GTAs who are not Virginia residents) - pays the difference between the Non VA tuition and the VA tuition.
    - ▪ Tuition and Fees 100% item types (awarded to non-GRA/GTAs) to pay the tuition and fees.
  - o Each award/item type has an expenditure type: Different types of awards/item types have different expenditure types. And, some Oracle awards only allow charges with a specific expenditure type.
  - o Reminder: You can only use a task with an 8 or fewer characters.

Reminder: Awards in Error

- • Please make sure you regularly check for and take steps to correct awards in error by running the SAFM Award Status report (in UBI or Discoverer).
- • It is important to resolve errors as soon as possible.

Academic Category & Package for Part-time Students

- • In 1178, few part-times students were funded in SAFM (93 total, most of those NRG students awarded Departmental Award).
- • If the Academic Category is part-time, you will only be able to choose the part-time package.
- • The part-time package includes:

- o   Tuition Fees Limited
- o   Wages

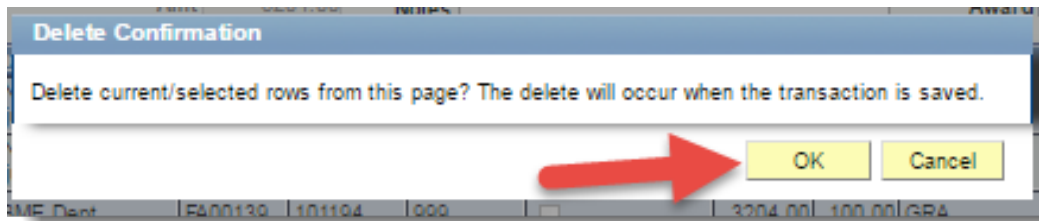## Reminder: Reversal Error Handling

1. When reversals OR the corresponding offset entries Error in the validation process, Errors will be fed back to SAFM. In the example below, the reversal or offset failed validation via the PTAEO validator (on the DA PTAEO page).
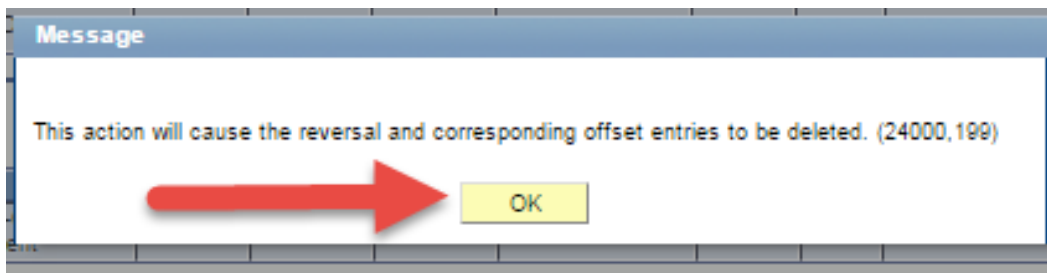

2. School Admins (only) will have the ability to delete the reversal and the offset entry in Error.
    - •   Click the minus button on the Reversal entry.

- •   Click OK.

- •   Then, you will see another message. Click OK.

- •   Now, the reversal and offset have been removed and the Award Status is set to processed. Save.

	Organization	Description	Target Name	Award	Project	Task	Clearing Account	Amt	%	Assistantships	Fund Source Status	Reverse		
1	31345	EN-Mech/Aero Engr Dept	124807 EN-DO-Grad Tuition Adjustment	SS00405	124807	101	☐	3204.00	100.00	GRA	Processed	☐	⊞	⊟

- When you go out of the SAFM Awarding Page and then come back in, the "Reverse" box will be open and available for another reversal should you wish to reprocess the reversal and/or offset entry.

Reporting: Reminder, Transition to UBI & Training

- Reminder: SAFM and DA reports are transitioning to UBI.
- The planned sunset for Discoverer SIS reporting: December 31, 2017.
- The Discoverer reports have crosswalk information at the top (so that you can find the equivalent report in UBI). Example:

University of Virginia
Award Status Report
UBI Report Information: UBI Module: SIS_FA_SAFM / UBI Tab (Report): Award Status

- For UBI Training: SIS eLearning is available in the Integrated System.
  - eLearning was offered concurrently with the UBI Instructor-led offering through October
  - After October, training online only.
  - To register and complete SIS eLearning:
   - Subscribe to the UBI Reporting – SIS Learning Path in the Integrated System Self-Service.


Reminder: Enrollment Discrepancy Reports (Discoverer & UBI)

- Reports used to reconcile data in SAFM with enrollment data, residency, and citizenship status.
- UBI:
  - Navigate to UBI, then pull up SIS_FA_SAFM.
  - Click on the Recon tab at the top.

- Two helpful SAFM reconciliation reports on that tab are entitled the Enrollment Discrepancy report (button) and the Award Discrepancy (button) report. (See the blue buttons below.)
- For fixed rate schools, the Enrollment discrepancy report would not apply. You should run the Award Discrepancy report instead.
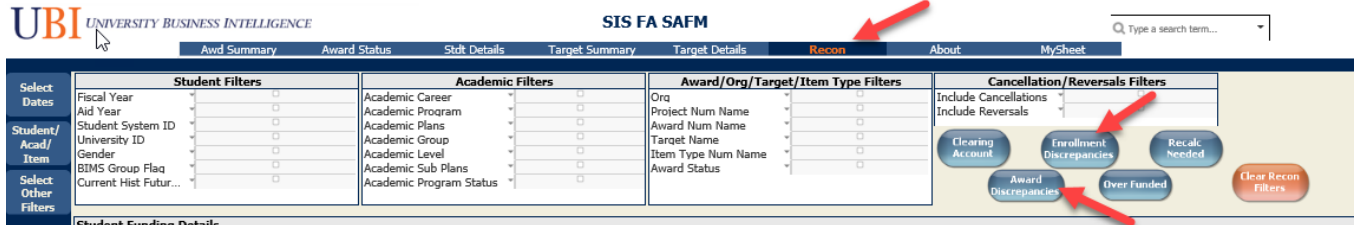
- Discoverer:
  - Pull up the SAFM workbook FA_SAFM Reconciliation Reports.
  - Two helpful SAFM reconciliation reports within that workbook are entitled the Enrollment Discrepancy report (tab) and the Award Discrepancy (tab) report.
  - For fixed rate schools, the Enrollment discrepancy report would not apply. You should run the Award Discrepancy report instead.
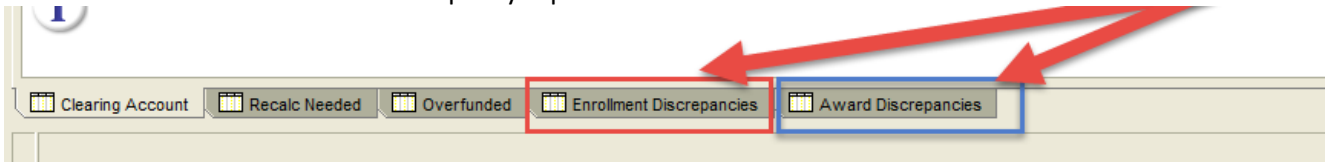


Meetings: Upcoming Dates, Times, Locations
- Upcoming monthly DAUG Meetings:
  - Wednesday, 12/13/17   Location: Ruffner 206
  - Wednesday, 1/10/18   Location: Ruffner 206 *Likely will be cancelled; we will let you know.*
  - Wednesday, 2/14/18   Location: Ruffner 206
  - Wednesday, 3/13/18   Location: Ruffner 206
  - Wednesday, 4/11/18   Location: Ruffner 206
  - Break for summer

Meeting Topics for 2018
- In 2018, we will be telling you about some additional enhancements we are working on now.
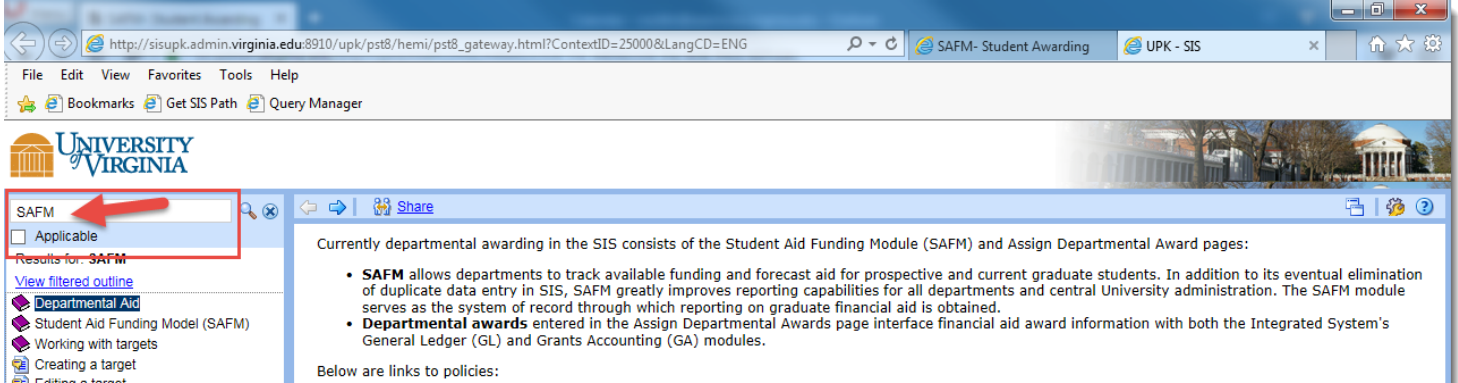- Topics you would like to see us review/discuss? Please let us know.

Reminder: Getting 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.
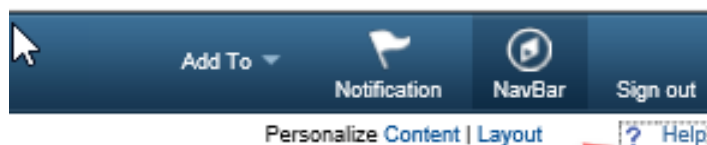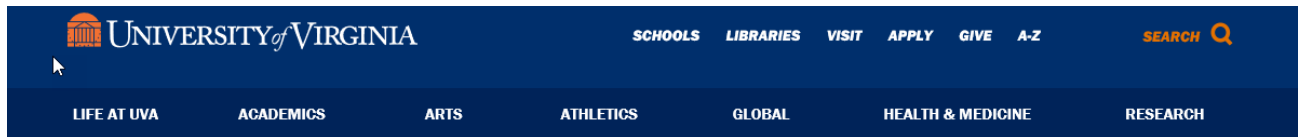

In the search box type "SAFM" and uncheck Applicable. You can view SAFM training materials and quick
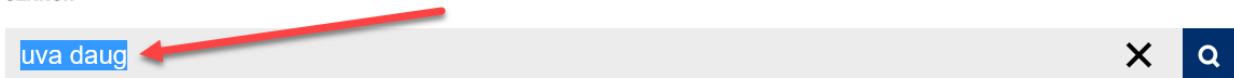
guides.

- 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	fmiller@virginia.edu
Nursing	Adam Seid	4-0067	ads8n@Virginia.EDU
Architecture	Cynthia Keifer	4-6442	cgk4h@virginia.edu

- Attend the monthly DAUG meetings. These typically occur on the second Wednesday of the month at 3:30pm.
- Send email to **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.

Q&A