Topics

- Important Dates
- Summer Tuition Revenue
- SAFM 2020-21: Reminders
- New for SAFM in 2020-21 (Expected Enhancements)
- SIS Responsibilities & Training + ESHARP
- Getting Help: Resources and Contacts

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Important Dates

Calendar Item	Date
2020 Spring Health Insurance Spring Disbursement	1/15/2020
March 2020 stipend disbursement	2/21/20
SAFM Open for 1206 Sum 1&2, 1208, 1201, 1212	March 26, 2020
April 2020 stipend disbursement	3/23/20
2020 Summer Tuition Calc'ed	Mid-April
Last Day to Get Your Entries in SAFM for Summer 2020	Mid-May (tuition shows as anticipated aid)
Finals Weekend (Graduation)	Friday, May 15 - Sunday, May 17, 2020
Summer Session	See https://summer.virginia.edu/calendars
Last Day to Process Changes in SAFM for FY20	6/18/2020 **
Last GA Interface to Oracle for FY2020	6/22/2020 (morning)**
See Chart Below for Additional Information Regarding Summer Dates	
2020 Fall Tuit Calc'ed (waivers go from $1 to tuit amt)	July 3, 2020**
Aetna Student Health Ins Website Opens	Mid July 2020
Fall Term Charges Notification	July 21, 2020 (GRAD, UGRD)
Fall Financial Aid Disburses	August 17, 2020 (GRAD, UGRD)
Fall Tuition Due Date	August 19, 2020 (GRAD, UGRD)
Fall First Day of Classes	August 25, 2020
Students w/Past Due or No Enrollment Cancelled (Fall)	August 31, 2020
Aetna Website Last Day to Enroll/Waive	September 18, 2020**

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

Stipend Disbursement Dates May 2020-August 2020 *Estimated

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 2020	12/18/2020
February 2020	1/22/2021
March 2020	2/23/2021
April 2020	3/23/2021
May 2020	4/23/2021
June 2020	5/21/2021
July 2020	6/17/2021
August 2020	7/23/2021

Sarah will provide a summary of the timing of stipend disbursements. If student has direct deposit, should receive $$ within 3-5 business days; will get an email from AP confirming timing.

Summer

Again for summer 2020, all summer session on-grounds graduate tuition will be going to the graduate schools.
You should only award a student a tuition award in either Summer 1 or Summer 2; not both. SAFM should not allow you to award tuition in both terms as of last year.

SAFM 2020-21: Reminders

SAFM will be opening in late March; below are a few reminders.

Reminder: Rollover Targets
As a refresher: targets are used to track your organization's fund sources for student aid by fiscal year. SAFM allows you to set up and track targets; this functionality allows for quick analysis of target usage and balances. Targets must be established before the module will allow awarding to students. Targets are tracked by Organization (Org) as defined in the Oracle HR/Finance system. Targets must be established for each Org from which you wish to fund students.

Please remember to setup your targets for 2020-21. Navigation: Financial Aid > UVa Financial Aid > Awarding > Student Aid Funding Module > SAFM- Target Setup.

Rollover Targets ☐ Select/Deselect All

	Target Total	Committed	ce ($)	Perso Stud
			64,000.00	Stud
	$66,000.0		13,960.29	Stud
	$115,197.0		06,027.00	Stud
	$116,662.00	$220,232.74	$-103,570.74	Stud
	$636,420.00	$656,198.97	$-19,778.97	Stud

Try It!   Actions   ✕

Click the
Select/Deselect All
checkbox.

Rollover Targets ☑ Select/Deselect All

Personalize | Find | 🗗 | ▦   First ◄

	Target Total	Committed Amount	Balance ($)	Students	Processed Amount	RO Flag
					00.00	☑
	$66,000.0				39.71	☑
	$115,197.0				70.00	☑
	$116,662.0				32.74	☑
	$636,420.0				80.97	☑
					00.00	☑
		$4,022.00	$-4,022.00	Students	$0.00	☑
		$23,993.58	$-23,993.58	Students	$23,993.58	☑
		$46,000.00	$-46,000.00	Students	$46,000.00	☑

Try It!   Actions   ✕

Notice that all of the **RO Flag** checkboxes are selected.

In this example, you have decided not to rollover the first target.
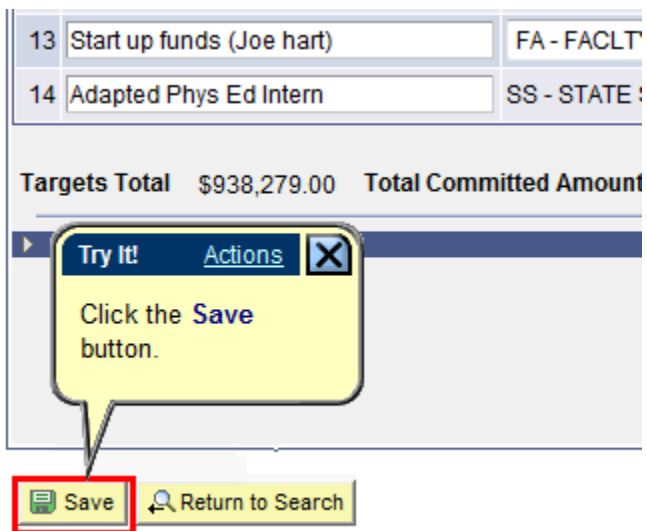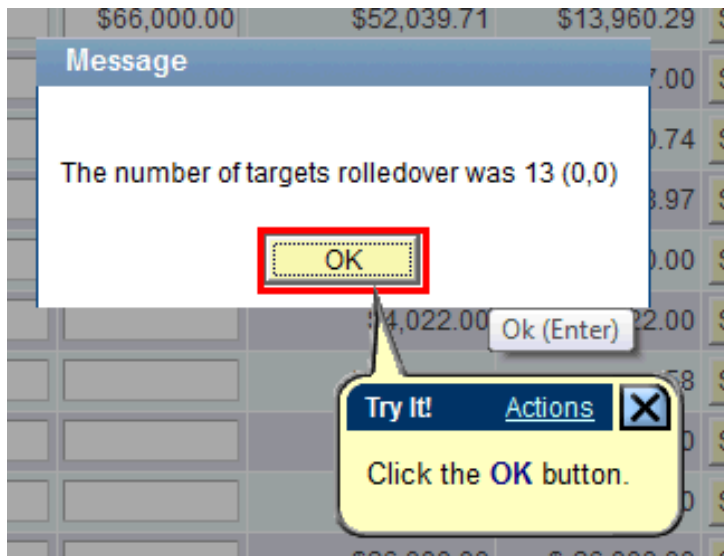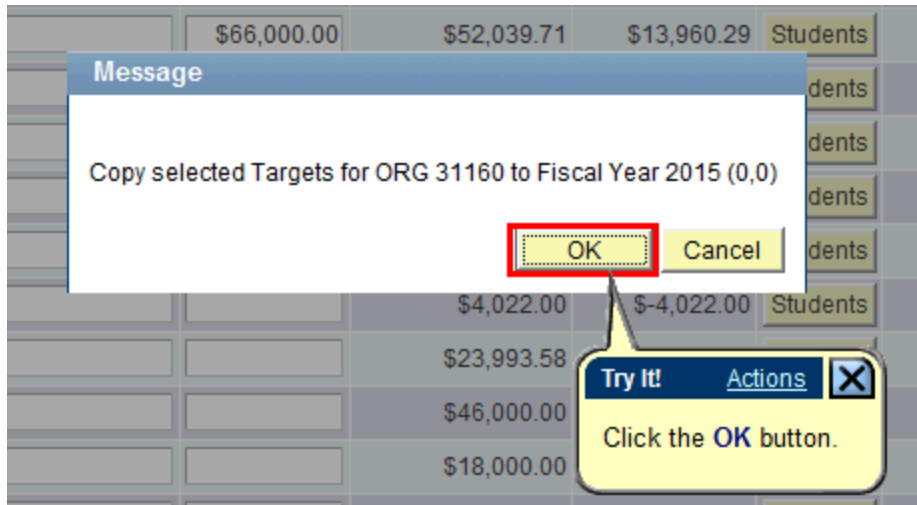
Uncheck the **RO Flag checkbox** for the first target.

Rollover Targets ☑ Select/Deselect All

Targe				
			0.0	
	$6		0.2	
	$11		7.0	
	$11		0.7	

Try It!   Actions   ✕

Review the RO Flag checkboxes to determine if all of the appropriate RO Flags have been selected.

Click the **Rollover Targets** button.

| | $66,000.00 | $52,039.71 | $13,960.29 | Students |

Message

Copy selected Targets for ORG 31160 to Fiscal Year 2015 (0,0)

[OK] [Cancel]

	$4,022.00	$-4,022.00	Students
	$23,993.58	
	$46,000.00	
	$18,000.00	

Try It!   Actions   ✕

Click the **OK** button.

| $66,000.00 | $52,039.71 | $13,960.29 |

Message

The number of targets rolledover was 13 (0,0)

[OK]

Ok (Enter)

Try It!   Actions   ✕

Click the **OK** button.

| 13 | Start up funds (Joe hart) | FA - FACLT' |
| 14 | Adapted Phys Ed Intern | SS - STATE |

Targets Total $938,279.00   **Total Committed Amount**

Try It!   Actions   ✕

Click the **Save** button.

🖫 Save   🔍 Return to Search

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 you are also a student the default does not stay.

Reminder: Awarding Admitted Applicants

We are opening SAFM for 2020-21 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). This enhancement was available when SAFM opened for 2018-19; so 2020-21 will be our third year with this functionality.

Important Points to Keep in Mind

- 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 the term is 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.
- You will also notice that a 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 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.

*Term	*Academic Category	Packaging Plan	Residency	Actual Enrollment Reg Hrs	Rch Hrs	Form of Study	GRA Hrs	GTA Hrs	Acad Level	Study Agreement	Acad Load	+
1178 ▾	PhD, Yrs 4+ ▾	▾	V	0.00	12.00	ENRL	0.0	0.0	L5		F	☑ International Student

| Package Student | Cancel Package | Recalculate Package | | Reverse Fund Source |

- In a few instances, >1 academic category have the exact same tuition rates. In those cases, we have combined the academic categories into one academic category: Nursing Masters & DNP, Curry Masters & PhD/EdD Yr 1-2, Medicine Yr 1, 2, 3, & 4
- If you select 1208, the academic category and international fall checkbox populates, you immediately decided to switch the term from 1208 to 1212 (via the drop down menu), you will get the following messages.

Message

Expected enrollment needs to be changed.

The Academic Level for the term has changed. (0,-1)

OK

Message

The student's approved academic load has changed for

Please cancel package, change the academic category, and select a new package. (0,-1)

OK
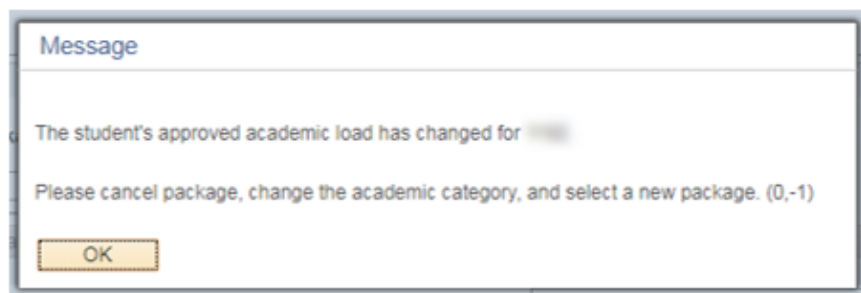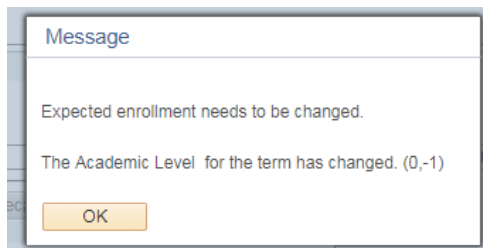
This is happening because the Acad Category and International Student fields already have a value in them; when you select the 1212 term, the values have changed and it displays the error messages. If this happens, you will need to click OK, then manually select the Acad Cat. and Packaging Plan OR go out and come back into the page without saving and start over.

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. But, you will not be able to move the health insurance award past start (defaulted to Start status and grayed out). Example (rate in box below is for demo purposes only; not an actual estimated amount):

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 ☑		☐	+ −

- We will also ensure that health insurance cannot 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. Example:

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%).

New for SAFM in 2020-21 (Expected 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

SIS Responsibilities & Training + ESHARP

- Users now complete training for SIS via Workday (you access the same training; it is now accessed through Workday as opposed to the Integrated System).
- For a list of all SIS responsibilities and training required, navigate to the ITS website > Systems – Administrative > Student Information System (SIS) > SIS: Responsibilities and Training. * The links on the SIS Responsibilities and Training page have been updated to take you directly to the courses in Workday.
- Training must be completed before the SAFM responsibility can be granted.
- General reminder: if you need to change your org access, you will need to submit an ESHARP request so that we can make the necessary row level changes in SAFM. Once you submit your request, a workflow passes the request to different levels of approval. We need these approvals to give you access to the org(s) in SAFM. To submit an esharp request:
  - Log in to ESHARP: https://cacs-web-prd.web.virginia.edu/esharp
  - Select Student Information System (SIS).
  - Select Request Add/Remove Access > New Request > Continue.
  - Select the UV FA SAFM User GRAD <for your school> under Financial Aid.
  - Complete the form; make sure that the action selected is "Add" and make sure you note which org(s) you will need access to and which org(s) you no longer need access to.
  - Click continue and then Submit Request for Review

Getting Help: Resources and Contacts
DAUG WEBSITE
http://sfs.virginia.edu/internal/deptaid

DAUG EMAIL LIST

If you are not already receiving these emails, let us know and we can add you.
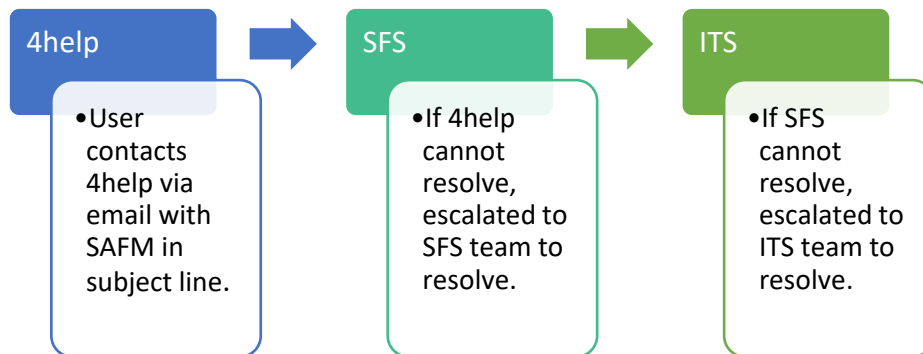
TRAINING MATERIALS & QUICK GUIDES

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

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
- User contacts 4help via email with SAFM in subject line.

SFS
- If 4help cannot resolve, escalated to SFS team to resolve.

ITS
- If SFS cannot resolve, escalated to ITS team to resolve.