Departmental Aid User Group

Topics

- News, Announcements, and Important Dates
- Reminders: Awarding in the Next Fiscal Year
- Upcoming SAFM Enhancements
- Reporting: SAFM UBI & Training
- SAFM Responsibilities and Training: Toolkit
- Reminder: Awards in Error
- Meetings: Upcoming Dates, Times, Locations
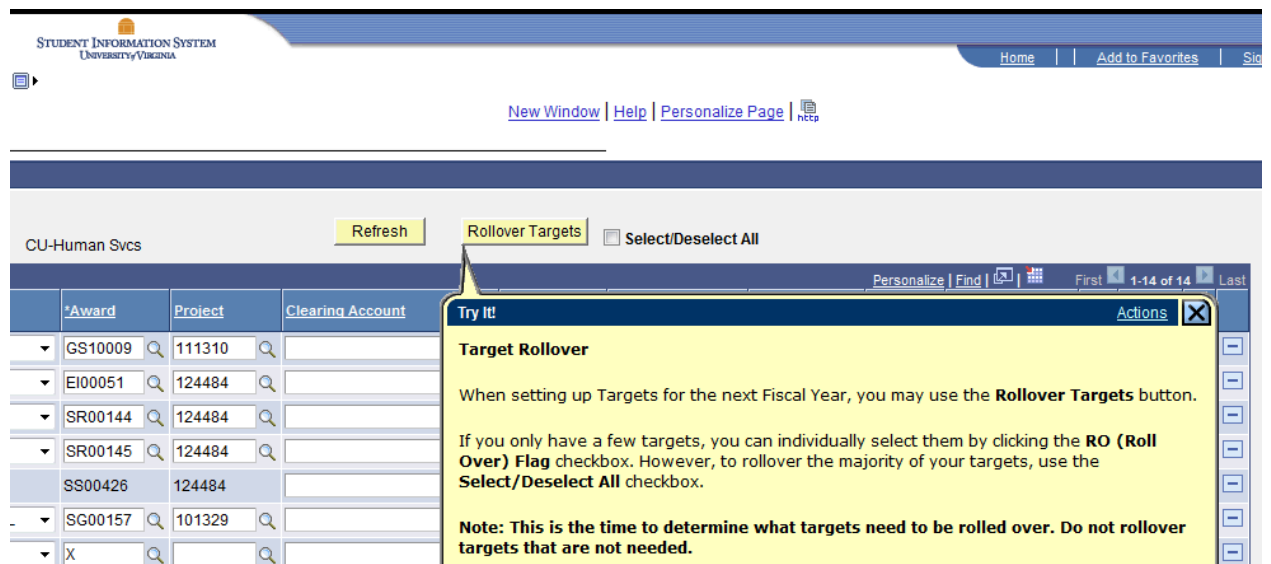- Reminder: Getting Help
- Q&A

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News, Announcements, and Important Dates

- Review important dates: http://sfs.virginia.edu/internal/deptaid

Reminders: Awarding in the Next Fiscal Year

- Please remember to setup your targets for the next fiscal year. Navigation: Financial Aid > UVa Financial Aid > Awarding > Student Aid Funding Module > SAFM- Target Setup.

Rollover Targets ☐ Select/Deselect All

	Target Total	~~mmitted~~	ce ($)	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 | S |

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

...ets	☑ Select/Deselect All						

otal	Committed Amount	Balance ($)	Students	Processed Amount	RO Flag	Rollover	
	$64,000.00	$-64,000.00	Students	$64,000.00	☐		➕ ➖
00.00	$52,039			71	☐	Y	➕ ➖
97.00	$9,170			00	☐	Y	➕ ➖
62.00	$220,232			74	☐	Y	➕ ➖
20.00	$656,198			97	☐	Y	➕ ➖
	$75,800					Y	➕ ➖
	$4,022.00	$-4,022.00	Students	$0.00	☐	Y	➕ ➖
	$23,993.58	$-23,993.58	Students	$23,993.58	☐	Y	➕ ➖
	$46,000.00	$-46,000.00	Students	$46,000.00	☐	Y	➕ ➖
	$18,000.00	$-18,000.00	Students	$12,000.00	☐	Y	➕ ➖
	$26,000.00	$-26,000.00	Students	$26,000.00	☐	Y	➕ ➖
	$22,707.00	$-22,707.00	Students	$22,707.00	☐	Y	➕ ➖
	$0.00	$0.00	Students	$0.00	☐	Y	➕ ➖
00.00	$4,000.00	$0.00	Students	$2,500.00	☐	Y	➕ ➖

Try It! — *Actions* ✖

Notice that the **Rollover** column updated with a "Y" indicating which targets have been rolled over to the next Fiscal Year.

Press [Enter] to continue.

- 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.

User Defaults 1	User Defaults 2	User Defaults 3	User Defaults 4	Enrollment Override Defaults	▷

User ID: msh8n Name: Harris,Megan S.

SetID: UVA01 🔍 University of Virginia

Aid Year: ⬅

- We are opening SAFM for Fall / Spring entry in March, which means you will be able to award admitted applicants. If you do this, please make sure to cancel their awards if they do not accept your offer of admission.

Upcoming SAFM Enhancements

- We have a few upcoming enhancements that we have mentioned previously, but since we are now getting closer to opening SAFM for 2018-19 awarding, we wanted to quickly review.

Upcoming Enhancement: 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 will default the academic category and international fee check box (if applicable). This enhancement will be available beginning mid-March (when SAFM opens for 2018-19).

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 new 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.

- 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
- Because of the code changes, if you award summer in 2018 ("Summer 1" in FY2018), when you add the row to add the term On SAFM Student Awarding page, if you pull up a student in 2018 and then add another row to add the summer term, you will be immediately asked if you want to save (see below). This is due to our recent code changes and will only happen this year. It is only a warning, so you will just need to click OK.

Upcoming Enhancement: Health Insurance in 2018-19

- We mentioned this in a previous meeting, but just wanted to remind you that this enhancement will be in place for 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).

  - 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.

- 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.

Reporting: SAFM UBI & Training

- Reminder: SAFM and DA reports have transitioned to UBI.
- New: A request for UV FA SAFM User responsibility in ESHARP automatically includes UBI reporting responsibilities. There is no need to request them separately or to take other than the FA SAFM User learning path.

SAFM Responsibilities and Training: Toolkit

- If new users need access to SAFM, please refer to the SAFM toolkit.
- This link is available via the DAUG website.
- Users who need access to make entries in SAFM need only request the UV FA SAFM User responsibility.

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.

Meetings: Upcoming Dates, Times, Locations

- Upcoming monthly DAUG Meetings:
  - Wednesday, 3/14/18, 3:30pm   Location: Ruffner 206
  - Wednesday, 4/11/18, 3:30pm   Location: Ruffner 206
  - We typically do not meet in May, June, or July but resume meeting in August

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.
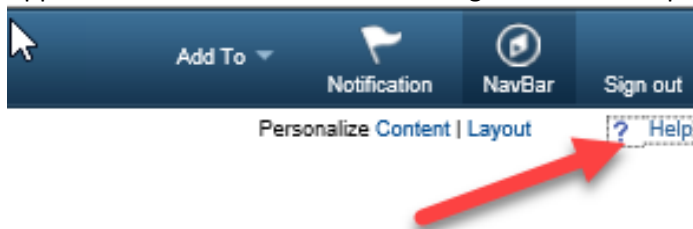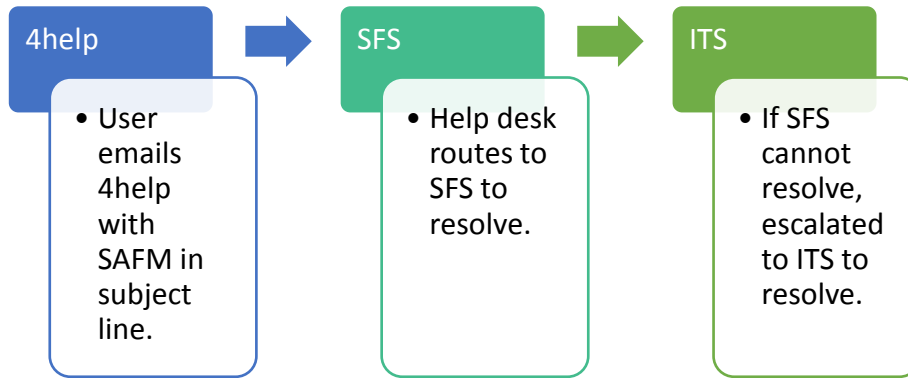

- In the search box type "SAFM" and uncheck Applicable. You can view SAFM training materials and quick guides.
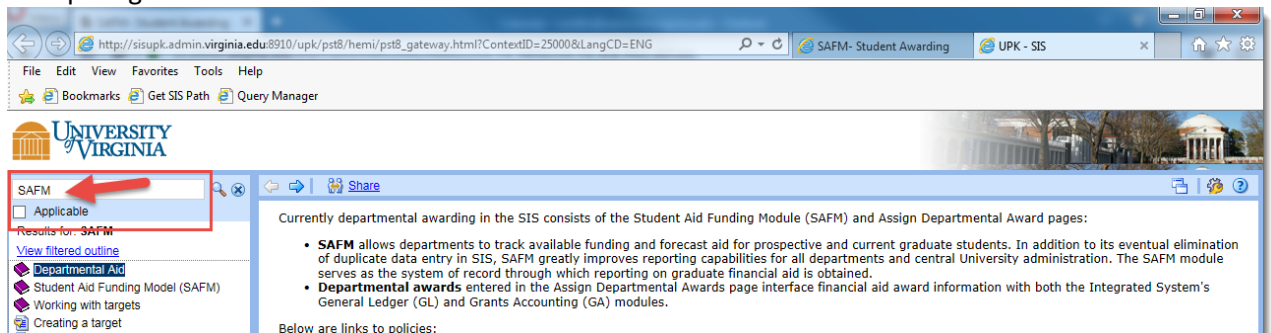
- Bookmark and visit the DAUG website: http://sfs.virginia.edu/internal/deptaid.
- Contact your School Admin/Local Expert via email or phone.

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 these meetings regularly (the monthly DAUG meetings) which typically occur on the second Wednesday of the month at 3:30pm (except May, July, July).
  - We typically sends a meeting reminder. If you are not receiving these emails or know someone else who should be, please let us know.
- Send an email to **4help@virginia.edu**; please enter a **subject line of *SAFM***. You do not need to copy anyone.
- 4help tickets are automatically routed:

4help		SFS		ITS
• User emails 4help with SAFM in subject line.	→	• Help desk routes to SFS to resolve.	→	• If SFS cannot resolve, escalated to ITS to resolve.

- Please do not send emails to individuals in SFS and/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. If someone is out of the office, others 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