

Topics

- Important Dates
- Summer Tuition Revenue
- SAFM 2019-20: Reminders
- New for SAFM in 2019-20 (Expected Enhancements)
- SIS Responsibilities & Training + ESHARP
- Getting Help: Resources and Contacts



Important Dates

Calendar Item	Date
March 2019 stipend disbursement	2/22/19
2019 Spring Health Insurance Spring Disbursement	3/1/19
SAFM Open for 1196 Sum 1 & 2, 1198, 1201, 1202, 1206 Sum 1	Mid-March 2019
April 2019 stipend disbursement	3/22/19
2019 Summer Tuition Calc'ed	Mid-April
Last Day to Get Your Entries in SAFM for Summer 2019	Mid-May (tuition shows as anticipated aid)
Finals Weekend (Graduation)	Friday, May 17 - Sunday, May 19, 2019
Summer Session	See https://summer.virginia.edu/calendars
Last Day to Process Changes in SAFM for FY19	6/19/2019
Last GA Interface to Oracle for FY2019	6/20/2019 (morning)
See Chart Below for Additional Information Regarding Summer Dates	
2019 Fall Tuit Calc'ed (waivers go from \$1 to tuit amt)	July 5, 2019
Aetna Student Health Ins Website Opens	Mid July 2019
Fall Term Charges Notification	July 23, 2019 (GRAD, UGRD, LAW)
Fall Financial Aid Disburses	August 19, 2019 (GRAD, UGRD, LAW)
Fall Tuition Due Date	August 21, 2019 (GRAD, LAW2, UGRD)
Fall First Day of Classes	August 27, 2019
Students w/Past Due or No Enrollment Cancelled (Fall)	September 3, 2019
Aetna Website Last Day to Enroll/Waive	September 18, 2019



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
<u>Tuition Awards</u>					
2018-19	1196	2020	Tuition – Summer 1	May 10, 2019	→ 2018-19
2019-20	1196	2020	Tuition – Summer 2	July 5, 2019	→ 2019-20
<u>Stipend Awards</u>					
2018-19	1196	2020	Stipends - June	May 23, 2019	→ 2018-19
2018-19	1196	2020	Stipends - July	June 18, 2019	→ 2018-19
2019-20	1196	2020	Stipends - August	July 23, 2019	→ 2019-20

Stipend Disbursement Dates May 2019-August 2020

Stipend	Disb Date
May 2019	4/23/2019
June 2019	5/23/2019
July 2019	6/18/2019
August 2019	7/23/2019
September 2019	8/23/2019
October 2019	9/23/2019
November 2019	10/23/2019
December 2020	11/19/2019
January 2020	12/17/2019
February 2020	1/23/2020
March 2020	2/21/2020
April 2020	3/23/2020
May 2020	4/23/2020
June 2020	5/22/2020
July 2020	6/18/2020
August 2020	7/23/2020

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 Tuition Revenue

Effective summer 2019, all summer session on-grounds graduate tuition will be going to the graduate schools.

SAFM 2019-20: Reminders

SAFM will be opening in 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 2019-20. Navigation: Financial Aid > UVa Financial Aid > Awarding > Student Aid Funding Module > SAFM- Target Setup.

The screenshot shows the 'Rollover Targets' section of the SAFM interface. It includes a table with columns for 'ward', 'Project', and 'Clearing Account'. The table contains several rows of data. A tooltip titled 'Target Rollover' is displayed over the table, providing instructions on how to use the 'Rollover Targets' button and the 'RO (Roll Over) Flag' checkbox. The tooltip also includes a note about determining which targets need to be rolled over.

ward	Project	Clearing Account
310009	111310	
00051	124484	
00144	124484	
00145	124484	
00426	124484	
00157	101329	

Target Rollover
 When setting up Targets for the next Fiscal Year, you may use the **Rollover Targets** button.
 If you only have a few targets, you can individually select them by clicking the **RO (Roll Over) Flag** checkbox. However, to rollover the majority of your targets, use the **Select/Deselect All** checkbox.
Note: This is the time to determine what targets need to be rolled over. Do not rollover targets that are not needed.

Rollover Targets Select/Deselect All

Target Total	Committed Amount	Balance (\$)	Students	Processed Amount	RO Flag
\$66,000.00			Students		
\$115,197.00			Students		
\$116,662.00	\$220,232.74	\$-103,570.74	Students		
\$636,420.00	\$656,198.97	\$-19,778.97	Students		

Try It! Actions X

Click the **Select/Deselect All** checkbox.

Rollover Targets Select/Deselect All

Target Total	Committed Amount	Balance (\$)	Students	Processed Amount	RO Flag
					<input checked="" type="checkbox"/>
\$66,000.00			Students	39.71	<input checked="" type="checkbox"/>
\$115,197.00			Students	70.00	<input checked="" type="checkbox"/>
\$116,662.00			Students	32.74	<input checked="" type="checkbox"/>
\$636,420.00			Students	80.97	<input checked="" type="checkbox"/>
				00.00	<input checked="" type="checkbox"/>
	\$4,022.00	\$-4,022.00	Students	\$0.00	<input checked="" type="checkbox"/>
	\$23,993.58	\$-23,993.58	Students	\$23,993.58	<input checked="" type="checkbox"/>
	\$46,000.00	\$-46,000.00	Students	\$46,000.00	<input checked="" type="checkbox"/>

Try It! Actions X

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

Target Total	Committed Amount	Balance (\$)	Students	Processed Amount	RO Flag
\$66,000.00			Students		
\$115,197.00			Students		
\$116,662.00			Students		

Try It! Actions X

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

Click the **Rollover Targets** button.

ets Select/Deselect All

Total	Committed Amount	Balance (\$)	Students	Processed Amount	RO Flag	Rollover	
	\$64,000.00	\$-64,000.00	Students	\$64,000.00	<input type="checkbox"/>		+ -
00.00	\$52,039				<input type="checkbox"/>	Y	+ -
97.00	\$9,170				<input type="checkbox"/>	Y	+ -
32.00	\$220,232				<input type="checkbox"/>	Y	+ -
20.00	\$656,198				<input type="checkbox"/>	Y	+ -
	\$75,800				<input type="checkbox"/>	Y	+ -
	\$4,022.00	\$-4,022.00	Students	\$0.00	<input type="checkbox"/>	Y	+ -
	\$23,993.58	\$-23,993.58	Students	\$23,993.58	<input type="checkbox"/>	Y	+ -
	\$46,000.00	\$-46,000.00	Students	\$46,000.00	<input type="checkbox"/>	Y	+ -
	\$18,000.00	\$-18,000.00	Students	\$12,000.00	<input type="checkbox"/>	Y	+ -

Try It! Actions X

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](#).

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.

User Defaults 1 | **User Defaults 2** | User Defaults 3 | User Defaults 4 | Enrollment Override Defaults

User ID: msh8n Name: Harris, Megan S.

SetID: University of Virginia

Aid Year:

Reminder: Awarding Admitted Applicants

We are opening SAFM for 2019-20 in March 2019, 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 2019-20 will be our second year with this functionality.

*Term	*Academic Category	Packaging Plan	Residency	Reg Hrs	Actual Enrollment	Reh 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 <input checked="" type="checkbox"/> International Student

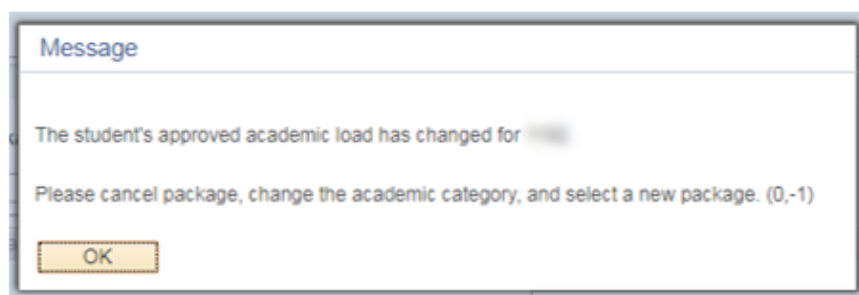
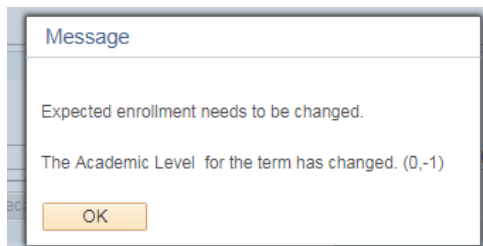
Package Student | Cancel Package | Recalculate Package | Reverse Fund Source

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 the 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
- If you select 1198, the academic category and international fall checkbox populates, you immediately decided to switch the term from 1198 to 1202 (via the drop down menu), you will get the following messages.



This is happening because the Acad Category and International Student fields already have a value in them; when you select the 1192 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):

640000020800 AY GRAD Health Ins Subsidy Amt 2890.00 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		890.00	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:

640000020800 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 2019-20 (Expected Enhancements)

Enhancement: Awarding Next Summer

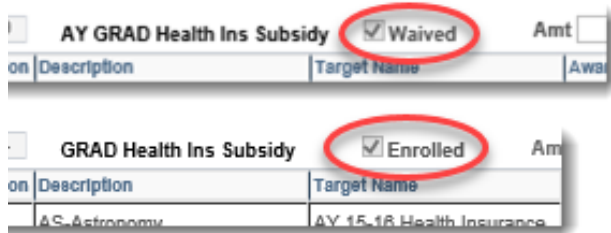
- When awarding SAFM for 2019-20, you will be able to enter awards in the following terms:
 - 1196 Summer 2019
 - 1198 Fall 2019
 - 1201 J-term 2020
 - 1202 Spring 2020
 - 1206 Summer 2020** (Summer 1 only)
- This means that you will be able to award for the full 2020 fiscal year.
- 1206 awards will not interface to the Departmental Aid page and will not be moved from Approved to Processed until a later date.

Enhancement: Prevent Users from Awarding Combos of Tuition Item Types in Summer

- As previously mentioned, we have been working on modifying SAFM to prevent users from awarding >1 tuition award that pays the same charge in the summer.
- In the summer, you can award students in either Summer 1 (Fiscal Year 2019, term 1196) or Summer 2 (Fiscal year 2020, term 1196). This allows you to choose which fiscal year you wish for the charges to hit your PTAEOS.
- You should only award a student a tuition award in either Summer 1 or Summer 2. Not both.
- Exception:** If you need to pay part of the student's tuition from a PTAEO in FY2019 and part from a PTAEO in FY2020, then you should use a limited package in Summer 1 and a limited package in Summer 2.

Enhancement: 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:



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 has is not updated.

- Also, if you were to add a health insurance award AFTER our process stops running for the term, the field indicating that the student has waived or enrolled is not updated.
- So, we have made changes so that the SAFM Awarding Page will more accurately reflect 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.

SIS Responsibilities & Training + ESHARP

- Workday go-live was on January 7, 2019. 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

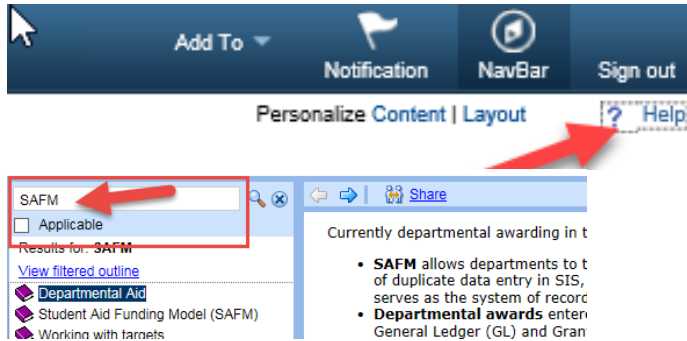
DAUG WEBSITE

<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

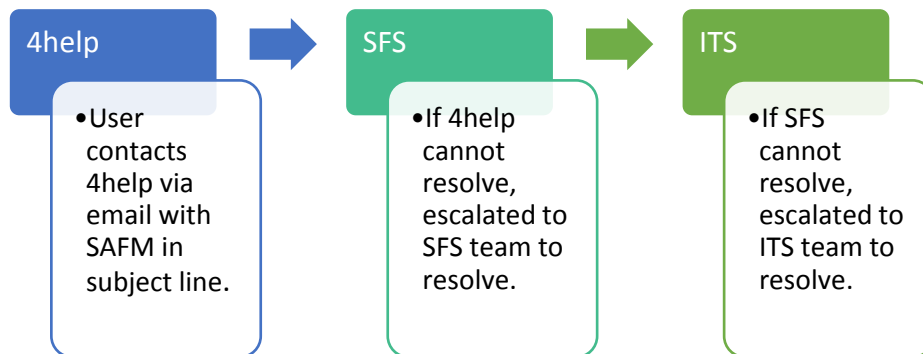


SCHOOL ADMINS

School/Unit	School Admin	Phone	Email
GSAS	Lloyd Banks	4-3919	lb3ne@Virginia.edu
Curry	TBD		
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	Carolyn Buchanan	4-6228	ceb4gw@virginia.edu

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?

